

TELSTRA IP TELEPHONY PREMIUM CALL CENTRE FOR AGENTS

USER GUIDE

IT'S HOW
WE CONNECT



WELCOME TO PREMIUM CALL CENTRE FOR AGENTS!

This user guide provides step-by-step instructions and reference information for using TIPT Premium Web Based Call Center client application Release 19.

AUDIENCE

This document is intended for Premium Call Center agents and supervisors who use the TIPT Premium Web Based Call Center Client.

NEED MORE SUPPORT?

For more information on the Premium Call Center procedures used by Customer Administrators, see

- TIPT Customer Administrator User guide
- TIPT Call Center Reporting Guide

CONVENTIONS USED IN THIS GUIDE

The following typographical conventions are used in this guide for simplicity and readability:

Web addresses, e-mail addresses and hyperlinks are shown in ***bold italics***, for example ***www.telstraenterprise.com.au***.

Button names and titles/features on your computer screen are shown in **Bold**.

Telstra IP Telephony Premium Call Centre for Agents

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CHAPTER 1

CALL CENTRE FOR AGENTS OVERVIEW

The TIPT Premium Call Center application is a Call Console management product for Call Center agents and supervisors.

This document describes the TIPT Premium Web Based Call Center clients.

TIPT Premium Call Center delivers the following benefits to users:

- Efficient call handling and Automatic Call Distribution (ACD) state management by Call Center agents
- Integration of online directories with Click-To-Dial capability
- Real-time monitoring of agent and queue activity by Call Center supervisors
- Historical reporting on agent and queue activity by Call Center supervisors

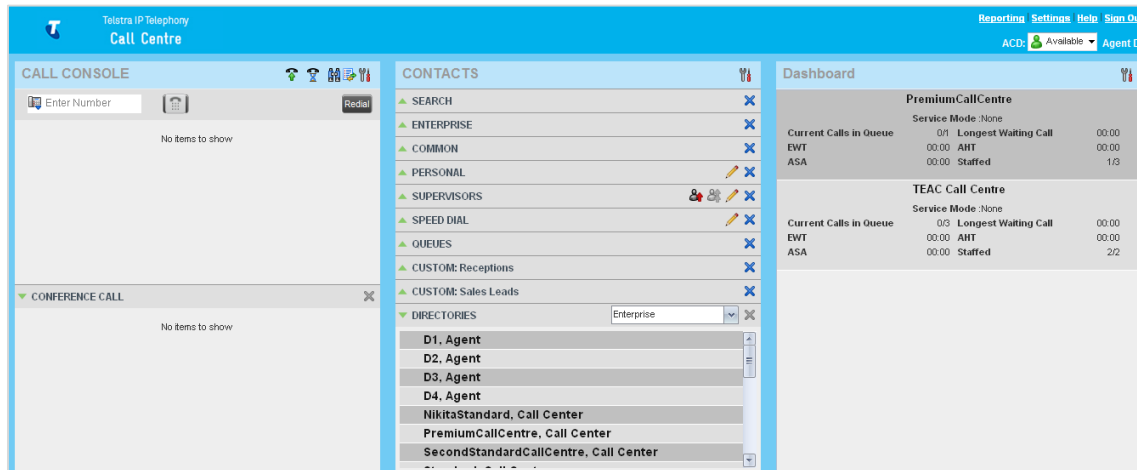
The Call Center functionality available to you depends on your Call Center function (agent or supervisor), the types of queues you are staffing or monitoring, and your own services and settings.

For more information about the capabilities and services assigned to you, ask your group or enterprise administrator.

Note 1: Call Centre functionality available in specific contexts is identified throughout the document.

CALL CENTER – AGENT

The Call Center – Agent client is designed to support the needs of call center agents in any environment. It supports the full set of call handling functions, ACD state management, integration of multiple directories, and other features required in large call centers.



Call Center – Agent Main Interface

The interface contains the following work areas:

- **Call Console pane** – You use the *Call Console* pane to view and manage your current calls
- **Contacts pane** – The *Contacts* pane contains your contact directories, the list of your supervisors, and the list of the call centers you belong to. It allows you to use your contacts to make and manage your calls. Both panes within the **Call Console** and **Contacts** windows can be moved within that window - i.e. the *Conference Call* pane can be moved up or down the screen.
- **Dashboard pane** – Use the *Dashboard* pane for an overview of the status of the call centres you are part of. Information about the queue and expected wait times will display.
- **Report windows** – You use the *Report* windows, accessed via the *Reporting* link, to generate reports about your activity and performance in the call centers you are staffing.
- **Settings pages** – You use the *Settings* pages, accessed via the *Settings* link, to configure various aspects of Call Center.

For more information about the Call Center user interface, refer to Chapter 3 Exploring the Workspace.

CHAPTER 2

GETTING STARTED

Call Center is hosted on TIPT and you access it over the network either from your web portal or from a web browser. The sign-in procedure is the same for agents and supervisors.

In addition, agents can sign into a Call Center using hot desk functionality, that is, sign in from any available desk configured for that purpose. Upon login, that desk's phone is associated with that agent and behaves as if it were the permanent phone of the agent, for the duration of the login session. This allows agents to use a single login ID to perform their work independently of their location.

Note: Call Centre does not support logging in as different users from the same machine at the same time.

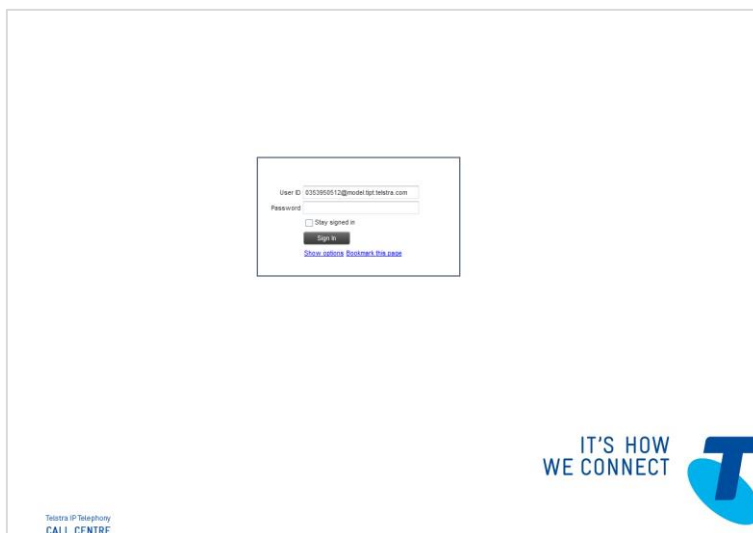
SIGN IN FROM WEB BROWSER

To sign in to the Call Center client, use the same credentials that you use to connect to the web portal.

To sign in to Call Center:

1. In your web browser, enter the URL of the Call Center client
<https://callcentre.tipt.telstra.com/callcentre>

The *Call Center Sign-in* page appears

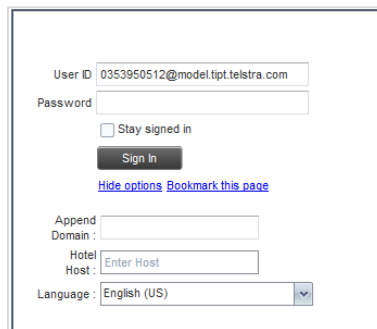


Call Center Sign-in Page

2. Enter your TIPT **User ID** in the format *user@domain* and your **Password**
3. If you are unsure of your user ID and password, contact your administrator
4. Providing the append domain name has been configured in the *Show Options* field, you can also enter just the *user* part of your ID. The system then appends the default domain to it before authenticating

you. However, if your domain is different from the default domain, you have to enter your user ID with the domain name

5. Optionally, if your system has been configured to allow that, you can configure your domain name
6. Check *Stay signed in* to instruct the client to automatically re-connect and sign in to the server when it detects a network connection
7. This should generally be enabled to help mitigate intermittent internet connections. When disabled, the client signs out the user when the connection is lost
8. To configure your domain name or the Call Center language, click **Show options**. The area expands displaying advanced options

A screenshot of the 'Advanced Options' section of the Call Center Sign-in page. It contains a 'User ID' field with the text '0353950512@model.tipt.telstra.com', a 'Password' field, a 'Stay signed in' checkbox, and a 'Sign In' button. Below these are links for 'Hide options' and 'Bookmark this page'. Further down are an 'Append Domain' text box, a 'Host' field with the placeholder 'Enter Host', and a 'Language' dropdown menu currently set to 'English (US)'.

Call Center Sign-in Page – Advanced Options

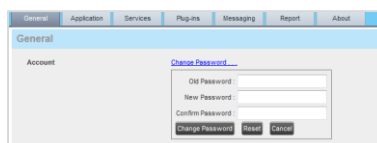
9. To configure your domain, in the *Append Domain* text box, enter your domain name. When you enter your user ID without a domain, the system will append the configured domain instead of the system-wide default domain
10. To change the language, from the *Language* drop-down list, select a new language
11. Click **Sign In**. Call Center starts and you are signed in

CHANGING YOUR PASSWORD ON FIRST TIME LOGIN

The first time you log into the Agent client you are requested to change your password. Your default password restrictions are configured by your Customer Group Administrator.

1. In your web browser, enter the URL of the Call Center client
2. Enter your TIPT user ID in the format *user@domain*
3. Enter your password
4. Check *Stay signed in* to instruct the client to automatically re-connect and sign in to the server when it detects a network connection
5. Click **Sign In**

On first time login, or if you are required to change your password the following screen will display requesting you to enter your old password and enter a new password

A screenshot of a 'Change Password' dialog box. It has a title bar with tabs for 'General', 'Application', 'Services', 'Plug-ins', 'Messaging', 'Report', and 'About'. The 'General' tab is active. Inside, there's a 'Change Password' link, followed by three input fields: 'Old Password', 'New Password', and 'Confirm Password'. At the bottom are three buttons: 'Change Password', 'Reset', and 'Cancel'.

Change Password Screen

1. Enter your old (current) Password
2. Type a **New Password** (Your default password restrictions are configured by your Customer Group Administrator)
3. Confirm your **New Password**
4. Click the **Change Password** button
5. The following information appears in the Logo Pane indicating that the password has been changed successfully.



Logo Pane Global Message

HOTELING SIGN IN

If you are a Call Center agent, you can automatically associate yourself with a Hoteling Host phone device when you sign in to the Call Center client. This is commonly used in a shared workspace environment where users working different shifts share a single computer and phone.

To use the hot desk functionality, you must have your Hoteling Guest service turned on. You turn on your Hoteling Guest service using the TIPT web portal or voice portal.

To sign in to Call Center as a hot desk user:

1. At the assigned workstation, start a web browser and enter the URL of the Call Center client. The *Call Center Sign-in* page appears
2. Enter your TIPT user ID and password
3. Click **Show options**. The area expands displaying advanced options
4. In the *Hotel* text box, enter the user ID of the Hoteling Host that corresponds to the desk/device you are using, for example, "03xxxxxxx@acme.com"
5. Click **Sign In**
6. You are signed in and Call Center associates that desk's phone with your user account for the duration of the session

Note: When you sign out from the Call Center client, the Guest session with the Host device at the desk is terminated. After sign-out the Host user ID you entered is saved and can be re-used on the next sign-in.

Note: The Host/Guest association can be configured with a time limit. If the association/session expires while you are signed in to the client, you are automatically signed out from client. The association time limit is specified in either the Hoteling Host or Hoteling Guest service setup on the TIPT web portal.

GET HELP

Call Center provides you with on-line access to a PDF version of this guide.



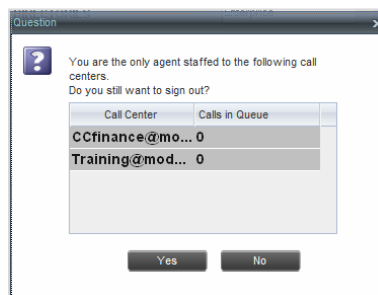
Logo Pane – Help Link

To access the document, click the **Help** link in the top right corner of the main interface.

SIGN OUT

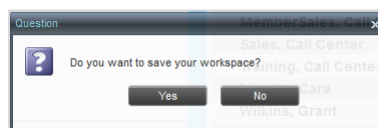
1. To sign out of the Call Center, click **Sign Out** in the top right corner of the main interface
2. If you are the last agent to sign out of a call center, a message appears providing the details of queues in which you are the last agent to sign out and asking you to confirm that you want to sign out

Note: This functionality is not available when you close the application using the browser's Close button or refresh (F5) the browser.



Pop-Up Dialog Window – Signing Out Last

3. To continue signing out, click **Yes**.
4. A message appears asking you whether you would like to save your current workspace.



Pop-up Dialog Window – Saving Workspace on Sign Out

5. To save your current workspace, click **Yes**. This allows you to retain the same interface setup for your next session.
6. If you are signing out from a hot desk, your account is dissociated from the hot desk where you were signed in.

SET UP CALL CENTER

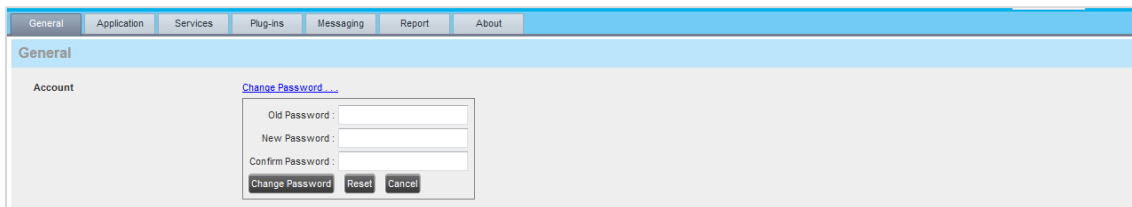
When you sign in to Call Center for the first time, it is recommended that you configure the following settings:

- Configure the queues you want to join on sign-in
- Configure your post-sign-in and post-call ACD states. For information, see the section [Settings – Application](#)
- Configure the supervisors whose call status you want to monitor. For information, see [Select Supervisors to Monitor](#)

CHANGE YOUR PASSWORD

You can change your password when you are signed in to Call Center.

1. To change your password, click the **Settings** link in the top right corner of the page
2. Click the **General Tab** and then click **Change Password**



Changing Password

3. Enter your old and new password in the provided text boxes and click **Change Password**

Note 1: The Reset button does not reset your password. It only clears the input boxes.

Note 2: This password is shared with your web portal and other client applications that share TIPT single logon policy. It has to meet password requirements set on TIPT.

Your default password restrictions are configured by your Customer Group Administrator.

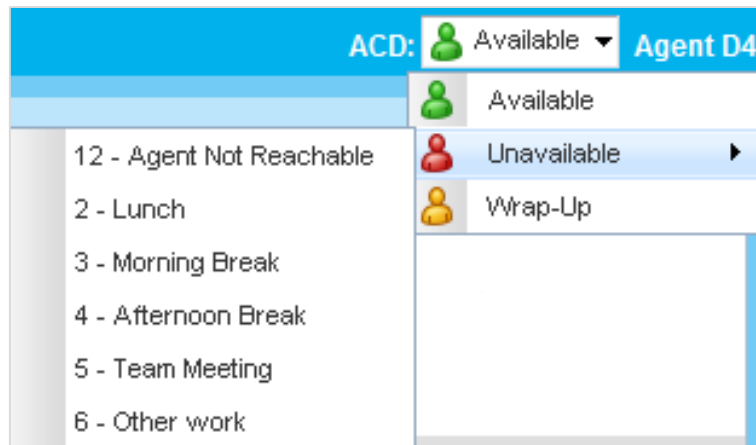
CHANGE YOUR ACD STATE (AGENTS)

1. In the *Logo* pane, click the **ACD states** box and select your ACD state from the drop-down list.



Logo Pane – ACD State Control

2. If you selected Unavailable, and your company requires you to provide a reason for your unavailability, select an Unavailable Code from the drop-down list.



Logo Pane – Unavailable Codes

ENABLE OR DISABLE SERVICES

Provided that your Customer administrator has assigned the services to you, you can use the Call Forwarding Always, and Do Not Disturb services in Call Center.

To enable or disable Do Not Disturb or Call Forwarding Always:

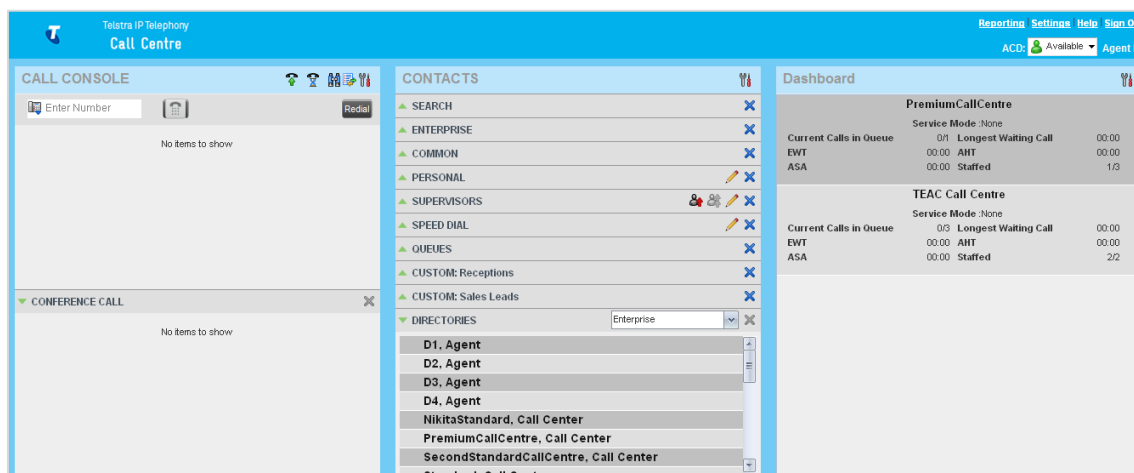
1. At the top-right corner of the main window, click **Settings**.
2. Click the **Services** tab
3. On the *Services* page that appears, select the service you want to enable or disable, and check or uncheck the **Active** box
4. If you checked the **Active** box for the Call Forwarding Always service, in the Forward To text box, enter the phone number to forward your call to
5. Click **Save**

Note: Do not use the Do Not Disturb feature if you are an agent in a Call Centre. Using this feature will not allow calls to be routed to your extension. It will also not put the agent into the Unavailable mode, which in turn will cause incorrect statistics when reports are run.

CHAPTER 3

EXPLORING THE WORKSPACE

Based on the license you have been assigned, when you sign in to Call Center, the main page appears where you perform most of your call management or monitoring tasks. In addition, the main page provides links to other pages and windows of Call Center, where you perform functions such as configuration and report generation.



Call Center – Agent Main Interface

Many visual aspects of the Call Center workspace are configurable. For example, you can change the size of windows on the screen. You can then save your workspace and retrieve it the next time you sign in.

Note 1: To work in full screen mode, make sure that the main window is in focus and then click F11. F11 is a toggle button to also take you out of full screen mode.

Note 2: The Back, Forward, and Refresh operations of the web browser are not supported by Call Center; and if performed, the results are inconsistent.

Most Call Center control button and action buttons are context-based, which means that they appear only when the action they represent can be performed. A list and description of control and action buttons available in Call Centre are documented in the Control section of this document see Chapter

Call Center interface contains the following elements based on the license you have been assigned (Agent or Supervisor):

INTERFACE ELEMENT	DESCRIPTION
Logo Pane	Located at the top of the main interface, the logo pane displays global messages, information about the logged user, and links to other Call Center interface functions.
Call Console Pane	The Call Console pane is where you manage your current calls. This pane contains the Calls and Conference pane

INTERFACE ELEMENT	DESCRIPTION
Contacts Pane	The Contacts pane contains your contact directories and allows you to manage your contacts, use contacts to make calls or take actions, such as transfer to contact or queue, on existing calls.
Dashboard Pane	Displays and overview of the call centres selected
Reporting Windows	The Reporting windows are accessible from the main page Logo pane via the Reporting link and provide access to Enhanced Reporting allowing you to generate, schedule and view reports. Agents can only generate reports about themselves.
Settings Pages	The Settings pages, accessible from the main page via the Settings link allow you to configure various user-level and application settings.
Controls	You use controls, such as buttons and drop-down lists, to execute actions on calls, contacts, and queues.

This section describes the following elements of the Call Center interface:

- Logo Pane
- Call Console Pane
- Contacts Pane
- Dashboard Pane
- Call History
- Controls

For information about other interface elements, refer to the following sections:

- Chapter 9 Managing the Dashboard
- Chapter 10 Generating Reports
- Chapter 4 Managing Calls
- Chapter 5 Monitoring Supervisors
- Chapter 8 Managing Contacts
- Chapter 11 Configuring Agent

LOGO PANE

The Call Center main window interface contains a logo pane, which displays the Call Center client or company logo, global messages, links to other interface elements or Call Center functions, and information about the logged user.

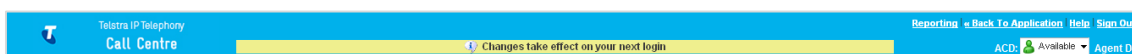


Call Center Logo Pane

GLOBAL MESSAGE AREA

The *Global Message Area* is the center area of the logo pane and is used by Call Center to display various information, warnings, and error messages to the user. A message is displayed for several seconds and then disappears.

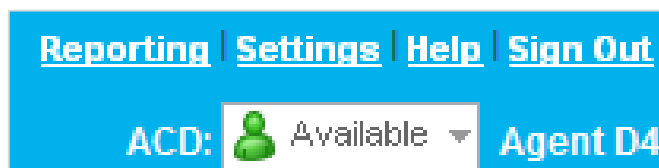
This area will also display alerts for queue thresholds and details of inbound queued calls that are being presented to you.



Logo Pane with Global Message

LINKS TO OTHER INTERFACE ELEMENTS AND FUNCTIONS

The logo pane displays links to the *Report* windows, *Settings* pages, as well as the Help and Sign Out links.



Logo Pane Links

LOGGED USER INFORMATION

Information about yourself, that is, your name, phone number, your availability to take calls, and your voice mail status, is displayed at the top right of the main interface.

Your current ACD state is displayed to the left of your name. You can change your ACD state by selecting a new state from the drop-down list.

1. ACD State 

Information about the following services and features is provided:

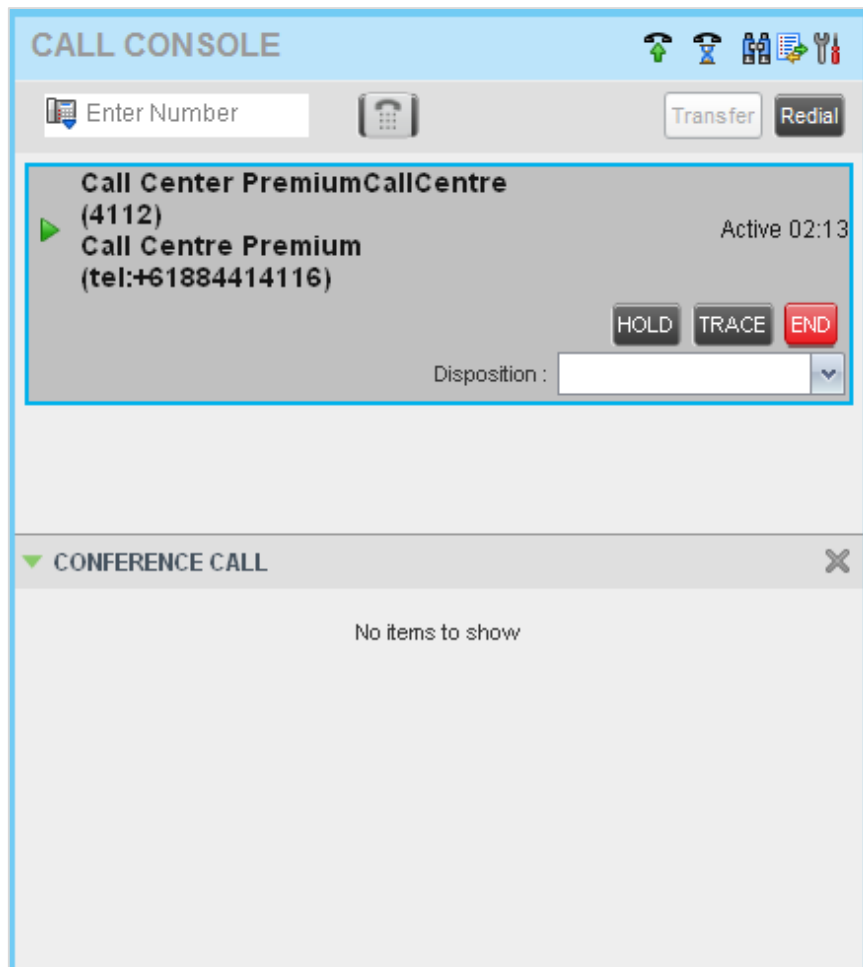
- Do Not Disturb (DND) 
- Call Forwarding Always (CFA) 
- Busy phone state 
- Voice Messaging 

The Voice Messaging icon is present only if you have outstanding voice messages.

CALL CONSOLE PANE

You use the *Call Console* pane to view and manage your current calls. For information on managing your calls, see Chapter 4

MANAGING CALLS



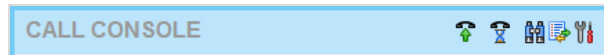
Call Console Pane

The *Call Console* pane contains the following areas:

- Header Bar
- Dialer
- Conference
- Conference Call Pane
- Call States

HEADER BAR

The header bar contains various controls that allow you to configure your services and perform call and service-related actions.



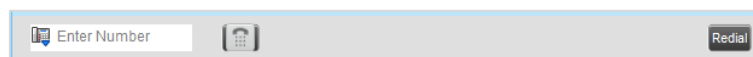
Call Console Header Bar

The header bar can contain the following controls:

- Disposition Code button  – This allows you to assign disposition codes to the last call. The button only appears when you are in Wrap-Up state
- Trace Call button  – This allows you to attach a trace to the last call
- Call History button  – This allows you to access the list of your previous calls – missed, received and placed calls
- Auto Answer button  – This allows you to enable or disable the automatic answering of calls
- Call Waiting button  – This allows you to enable or disable the Call Waiting service

DIALER

The *Dialer*, located at the top of the *Call Console* pane, allows you to make ad-hoc calls and set your outgoing calling line identity (CLID) for the next call.



Call Console - Dialler

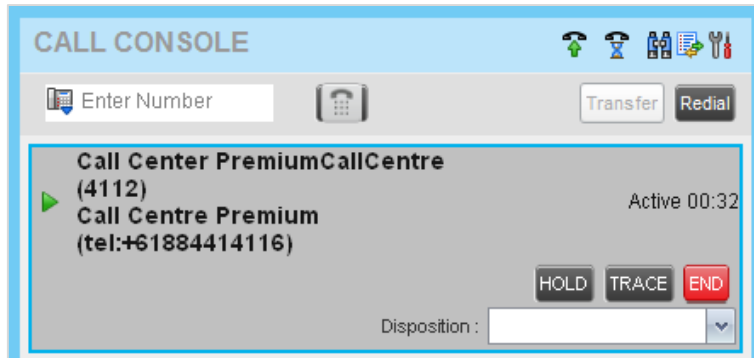
It contains the following elements:

- The Outbound CLID button  which allows you to configure the number you want to use for outgoing calls
- The *Enter Number* text box, where you enter the number to dial
- Action buttons, which change depending on the context and allow you to perform operations on calls. For more information see Chapter 3 Exploring the Workspace, Call Action Buttons

CURRENT CALLS – CALL CONSOLE

The *Call Console* displays your current calls, both direct calls and Call centre calls and allows you to take actions on them. Direct calls are calls placed from or received on your own phone number, whereas ACD calls are calls routed to you from a call center that you are staffing as an agent.

If you are involved in a conference call, its details are displayed in a separate area of the Call Console, called the *Conference Call* panel.

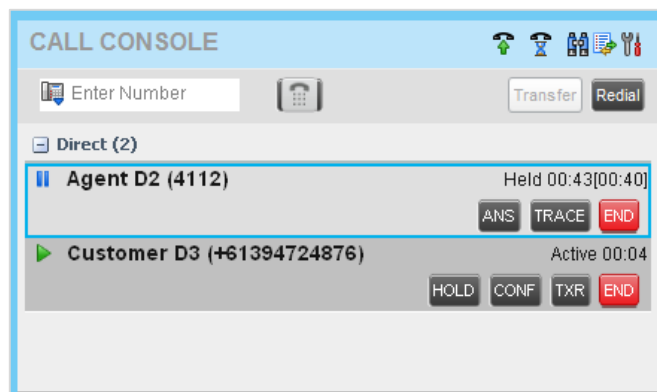


Call Console Pane – Current Calls

The following information is displayed for each call:

- **Remote CLID** – This is the name of the remote party (if available) and the phone number in parenthesis.
- **Call State icon** – This is a visual representation of the current state of the call
- **Call State name** – This is the display name of the call state the call is currently in for details see Chapter 3 Exploring the Workspace, Call Console Pane, Call States
- **Call duration [Held duration]** – This is the duration of the call from the time the call was received from TIPT and it reflects how long the call has been present in the system. In addition, if a call has been placed on hold a held timer will display.

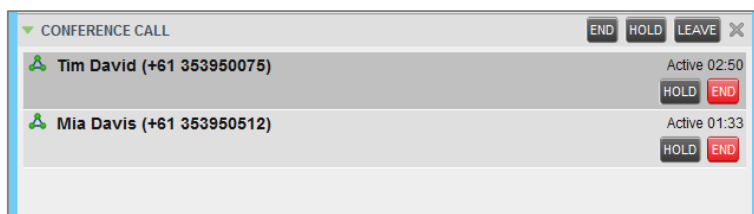
The call entry also displays action buttons for the operations that you can currently take on that call. The actions you can perform depend on the state of the call.



Call Console – Calls in with Action Buttons

CONFERENCE CALL PANE

The *Conference* Call pane displays your current conference and allows you to manage your conference calls.



The header bar contains various controls that allow you to manage the conference:

- End Conference button  – This allows you to end the current conference
- Leave Conference button  – This allows you to leave the conference
- Hold Conference button  – This allows you to place the conference on hold
- Resume Conference button  – This allows you to resume the conference that you previously placed on hold

The *Conference Call* panel, when expanded, lists the call legs that make up your current conference. Each two-way call is displayed on a separate line. The information displayed for each call leg is the same as the information displayed for two-way calls on the *Calls* panel. For information, see *Current Calls – Call Console*.

For information on managing conferences, see Chapter 4 *Managing Calls, Managing Conference Calls*.

Note 1: You can only be involved in one conference call at a time.

Note 2: The Conference Call pane must be expanded (as shown below in the diagram) for the *End*, *Hold*, and *Leave* buttons to operate as expected.

CALL STATES

The following table lists the possible call states of calls.

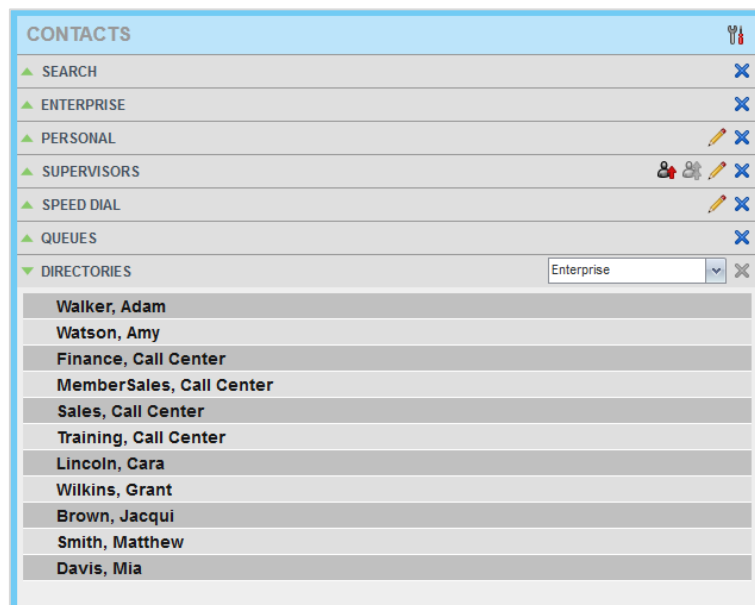
CALL STATE	DISPLAY NAME	DISPLAY ICON
Ringing In (Local)	Incoming Local	
Ringing In (Remote)	Incoming	
Ringing Out, Outgoing	Outgoing	
Active	Active	
On Hold	Held	
On Hold (Remote)	Remote Held	
Active (In Conference)	Active	

CALL STATE	DISPLAY NAME	DISPLAY ICON
Held (In Conference)	Held	
Ringling In (Recalled Call)	Call Recalled	

CONTACTS PANE

The *Contacts* pane contains your contact directories and allows you to use your contacts to make or manage calls. For information on using contacts to manage calls, see Chapter 4 Managing Calls. For information about organising and managing your contact directories, see Chapter 8 Managing Contacts.

500 Personal Contacts can be created in CommPilot, however currently a maximum of 50 can be displayed. When you search you have access to all 500 contacts but the client can only display 50 in the web based client applications.



Contacts Pane

The Contacts pane contains the following panels:

- Search
- Enterprise
- Personal Panel
- Supervisors Panel
- Speed Dial Panel
- Queues Panel

The contact directories you have access to depends on your system configuration as well as the services assigned to you. For more information, contact your administrator.

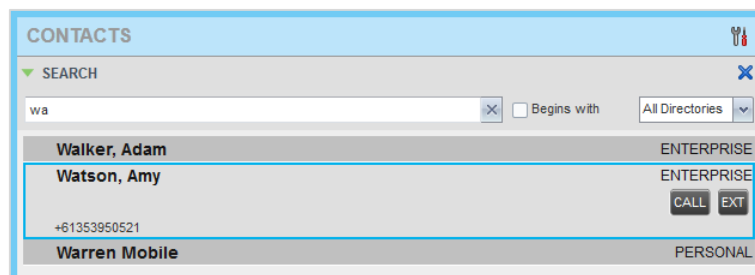
When you click a contact, the entry expands and the contact's information, such as phone numbers and the action buttons for the operations that you can currently do for that contact appear.

To minimise the contact's information, click on the contact again.

You can only view the details of one contact per directory at a time. When you click another contact in the same directory, the details of the currently expanded contact are automatically hidden

SEARCH PANEL

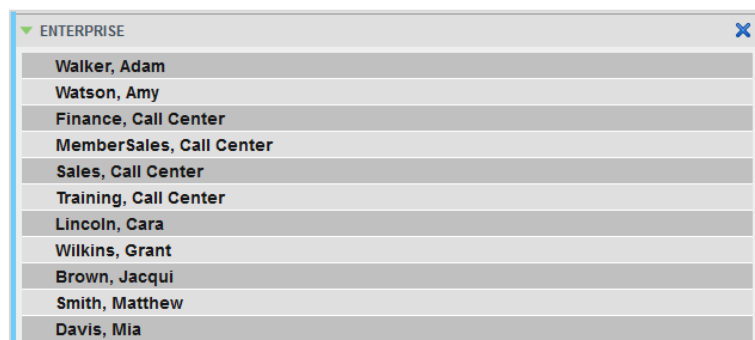
You use the *Search* panel to look for specific contacts in your contacts directories. When search criteria are entered and a search performed, search results are populated into a single area. For information about performing contact searches, see Chapter 8 Managing Contacts, Searching for Contacts.



Contacts Pane – Search Panel

ENTERPRISE PANEL

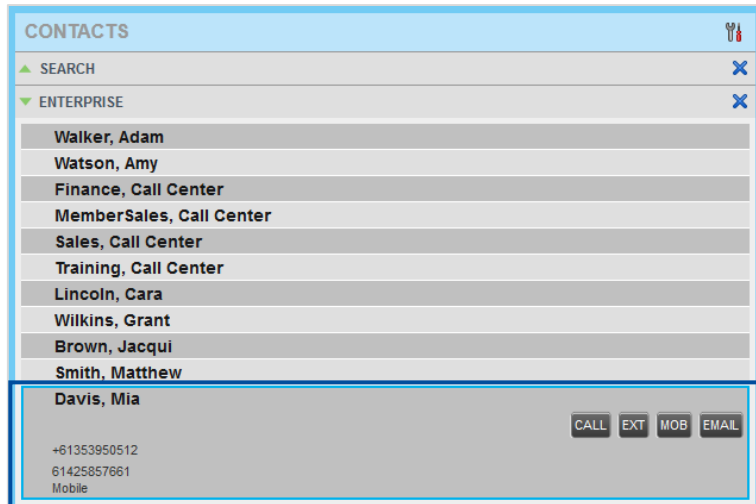
The *Enterprise* panel contains the contacts in your TIPT enterprise directory. If your enterprise administrator restricted your access to the enterprise directory, you can only see the contacts from your group.



Contacts Pane – Enterprise Panel

The *Enterprise* panel displays the contact's name and phone number.

When you click on a contact, the entry expands to provide the contact's details, such as all available phone numbers. To minimize the details, click on the contact.

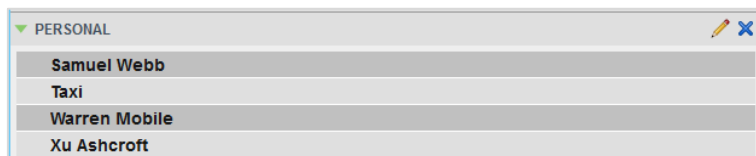


Enterprise Panel – Contact Details

PERSONAL PANEL

The *Personal* panel contains the contacts from your TIPT Personal Phone List. It displays the name/description and phone number of each contact.

For information about managing your personal contacts, see [Managing Personal Contacts](#).



Contacts Pane – Personal Panel

SUPERVISORS PANEL

The Supervisors panel, available to agents, contains the list of your supervisors. The main purpose of this directory is to allow you to quickly contact a supervisor.



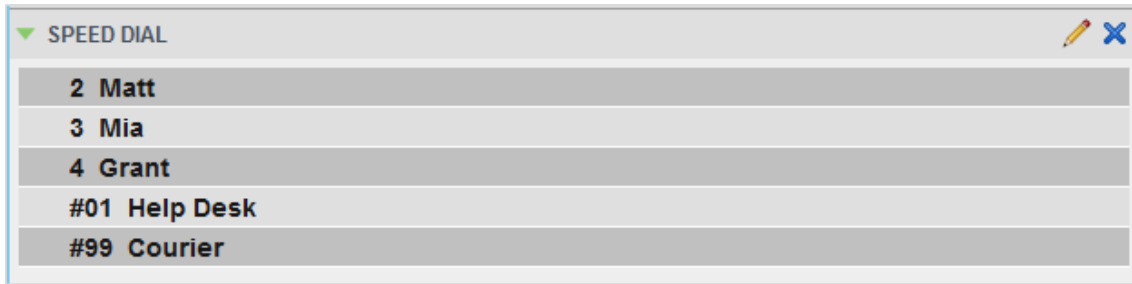
Contacts Pane – Supervisors Panel

- Selected supervisors have their call status displayed. For more information, see [Chapter 5 Monitoring Supervisors](#).

SPEED DIAL PANEL

The *Speed Dial* panel displays and allows you to manage your Speed Dial 8 and Speed Dial 100 contacts.

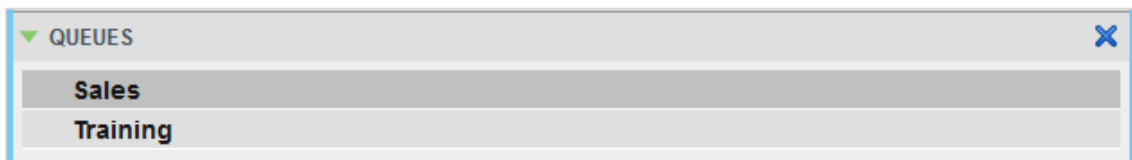
For each speed dial number, Call Center displays the speed dial code, the description, and the phone number. The description is what you entered when configuring the number.



Contacts Pane – Speed Dial Panel

QUEUES PANEL

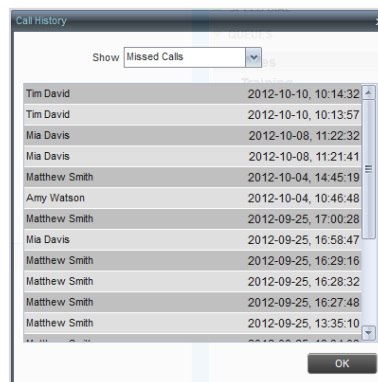
The *Queues* panel is available to both agents and supervisors. It lists the call centers you are staffing as an agent or monitoring as a supervisor. The primary purpose of this panel is to provide you with a quick way to transfer calls to queues.



Contacts Pane – Queues Panel

CALL HISTORY

The *Call History* dialog-box, accessed via the Call History button in the *Calls* panel allows you to view your past calls – Missed, Received and Placed. You can place a call to a number from Call History and manage call logs.



Call History

DASHBOARD PANE

The Dashboard pane displays an overview of queue activity for agents. If thresholds have been configured for the call centre the visual indications will display for the relevant section. For more details see Chapter 9 Managing the Dashboard.

Dashboard 			
PremiumCallCentre			
Service Mode :None			
Current Calls in Queue	0/1	Longest Waiting Call	00:00
EWT	07:33	AHT	07:33
ASA	00:00	Staffed	1/3
TEAC Call Centre			
Service Mode :None			
Current Calls in Queue	0/3	Longest Waiting Call	00:00
EWT	00:00	AHT	00:00
ASA	00:00	Staffed	2/2

Dashboard

The information displayed is:

Queue Name – Name of the queue

Service Mode - Current mode of service

Current Calls in Queue – current number of calls in the queue. This is a ratio actual number of calls/queue length

Longest Waiting Call – The amount of time the oldest call has been in the queue

EWT – Estimated Wait Time, the estimated time it will take for calls to be answered once they are in the queue

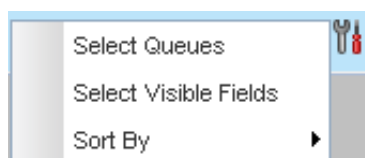
AHT – Average Hold Time, the average amount of time calls are held in the queue

ASA – Average Speed of Answer, the average time it takes for a call to be answered by an agent once the call has been presented to the agent

Staffed - Number of agents available in the queue. This is a ration of actual number of agents/number of agents assigned to the queue

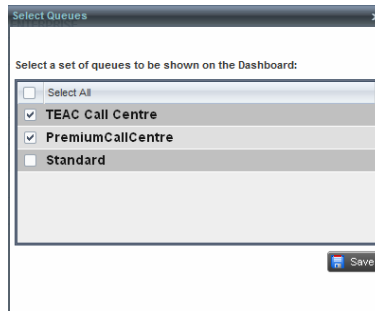
To select the queues to view in the Dashboard:

1. Click on **Options** 
2. Click on **Select Queues**



Dashboard Options

3. Check the box for the required queues and click **Save**



Queue Select

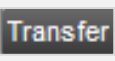
CALL ACTION BUTTONS

Action buttons allow you to perform actions on calls, such as answering or transferring a call, or actions that result in a call being placed.

Action buttons are context sensitive and appear on a line/entry only when you move the mouse over that entry and when the corresponding action can be performed on that entry. For example, when you select a contact in the *Enterprise* directory, the relevant buttons may appear on a contact, depending on the call state and the contact's configuration which enable you to perform the appropriate action.

No buttons appear on the remaining lines/entries/calls.

The following table lists the action buttons available in Call Center.

BUTTON	DESCRIPTION
 Dial	This dials the number you entered in the Dialler.
 CALL	This places a call to the selected contact or to a number from Call History.
 Redial	This redials the last dialled number.
 EXT Extension	This dials the contact's extension.
 MOB Mobile	This dials the contact's mobile number.
 EMAIL E-mail	This brings up a new e-mail message window with the contact's e-mail address, allowing you to send a message to the contact.
 Transfer	This will transfer a call to an ad hoc number entered in the Dialler.

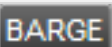
BUTTON	DESCRIPTION
 Transfer	This transfers a call to a selected number or contact.
 Answer	This answers an incoming call, answers an unanswered call for a contact, or resumes a held call.
 Hold	This places a call on hold.
 End	This ends a call.
 Trace	This generates a call trace on a call.
 Conference	This establishes a conference call or adds a call to a conference.
 Camp	This camps a call on a busy contact.
 Escalate Call	This escalates a call to a selected supervisor.
 Emergency Call	This places an emergency call to a selected supervisor.
 Delete Call Log	This deletes a call log from Call History.

CONTROLS

Call Center controls are designed as being context sensitive, controls appear only when the action they represent can be performed. For example, when you enter a number or select a contact, a *Dial* button appears allowing you to place a call. The context sensitive controls that correspond to call operations such as dialing, transferring calls, or putting calls on hold are known as action buttons.

The following table lists the general controls used in Call Center and the controls displayed on the panels' headers.

NAME	DESCRIPTION
Common Controls	
 Options	This is located in the upper-right corner of a pane or page. When clicked, it displays a drop-down menu of options that control the display of information in that pane/page. The available options depend on the context.
 Expand/Collapse	This shows or hides the contents of a window or panel.
 Close	This closes an interface element, such as window, pane, or panel.
 Edit	This allows you to edit a list of items, such as agents to monitor or speed dials.
Dialer, Call Console, Directories Panel, and Search Panel Controls	
 Outbound CLID	This allows you to select a phone number (if pre-configured) to use as your Calling Line ID for the next outgoing call.
 Disposition Code	This allows you to apply one or more disposition codes to the last call when you are in Wrap-Up.
 Trace Call	This allows you to attach a trace to the last call.
 ACD States	This displays your current ACD state and allows you to change it.
 Call History	This displays Call History.
 Auto Answer	This allows you to turn Auto Answering on or off.
 Call Waiting	This allows you to turn Call Waiting on or off. It is available only if you have been assigned the Call Waiting service.
 End Conference	This ends a conference call.

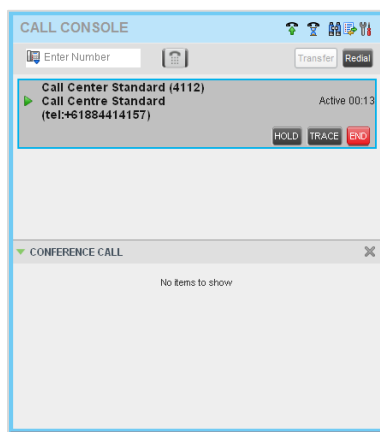
NAME	DESCRIPTION
 LEAVE Leave Conference	This disconnects you from the conference while allowing other participants to continue the call.
 HOLD Hold Conference	This holds the conference call.
 ANS Resume Conference	This resumes a held conference.
 BARGE Barge In	This “un-mutes” your Silent Monitoring call, thereby establishing a Three-Way Conference.
Dialog Box – Notification Window	
 Web Pop URL	This opens a page in your browser at the configured URL to provide additional information about the caller.
 vCard	This saves the caller’s phone number and personal information as a vCard in Microsoft Outlook. It appears only when Outlook is running.
Supervisors Panel	
 Emergency	This makes an emergency call to a supervisor.
 Escalate	This escalates a call to a supervisor.
Scheduled Reports Window	
 Load Report	This loads a scheduled report, allowing you to view and modify it.
 Delete Report	This deletes a scheduled report.

CHAPTER 4

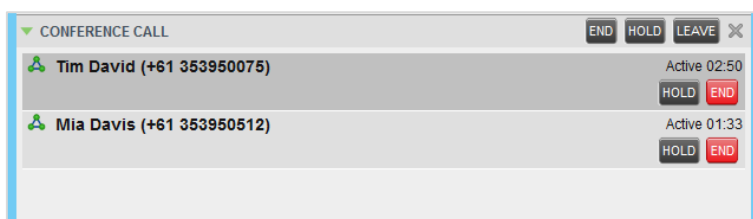
MANAGING CALLS

This section describes the operations you can perform to make and manage calls.

Your current calls are displayed in the *Call Console* with the calls currently involved in a conference displayed in a separate panel called *Conference Call*.



Call Console Pane/Calls panel



Call Console Pane/Conference panel

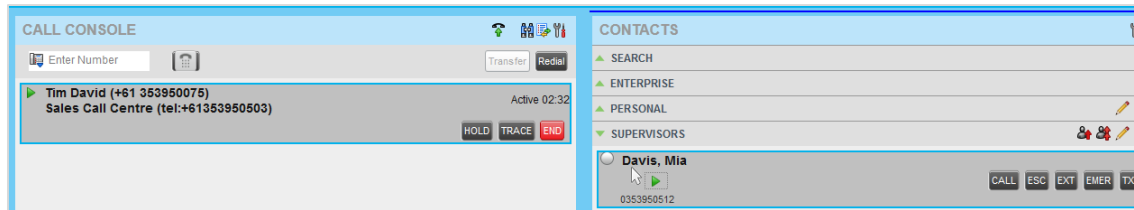
Note 1: You can only have one conference at a time.

Note 2: To have more than 3 parties in a conference call you will need the N-Way licence assigned. N-Way is a feature of the Executive service pack.

DRAG AND DROP CALL ONTO CONTACT

In Call Center, you can drag a call from the Call Console and drop it on a target contact in one of your contact directories. This provides you with a quick way to perform operations on calls that involve a contact.

As the call is dragged, a green icon is displayed. When the call is dropped onto a contact, no action is taken on the call. The target contact expands and you can select the action button for the operation you want to perform on that call.



Dragging Call and Dropping on Contact

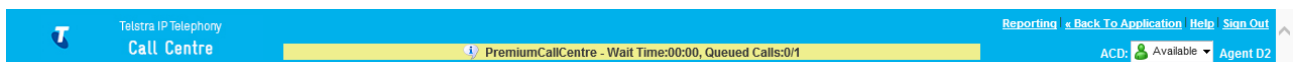
VIEW INCOMING CALL DETAILS

Inbound calls are displayed in three ways

- Global Messages Area
- Call Console
- Call Notification Pop up

GLOBAL MESSAGE AREA

When an inbound call from the Call Centre is presented to you the details of the call will display in the Global Messages area. If the call is a direct call to your extension, no information will display in the Global messages area. The details will include the Wait Time for the call and the Queued Calls ratio.



When the Call Notification feature is enabled, a *Call Notification* pop-up window appears on top of the system tray when you receive an inbound call. You are not able to answer the call from the Global Message Area.

CALL CONSOLE

For calls to your direct number or extension, the following information is displayed:

- Calling party name
- Calling party number

For calls from a call center, the following information is displayed:

- Calling party name
- Calling party number
- Call center name, followed by the time the call has been waiting in queue (Wait Time)
- Number of calls in queue (Queued Calls)

CALL NOTIFICATION POP-UP

For calls to your direct number or extension, the following information is displayed:

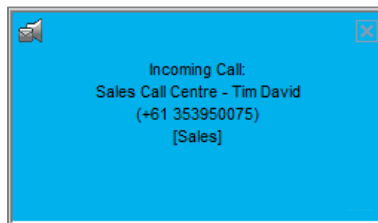
- Calling party name
- Calling party number



Call Notification Pop-up Window for a Non-ACD Call

For calls from a call center, the following information is displayed:

- Calling party name
- Calling party number
- Call center name, followed by the time the call has been waiting in queue (Wait Time)
- Number of calls in queue (Queued Calls)



Call Notification Pop-up Window for an ACD Call

Note 1: You have to have only one tab open in the browser running Call Center to receive call notifications.

Note 2: If calls come within eight seconds of each other, the Call Notification pop-up window appears only for the first call of that series.

RECEIVING, ANSWERING, AND ENDING CALLS

You can answer calls manually or have your phone automatically answer incoming calls.

ANSWER CALL

Note: When using the Remote Office service, the Answer button is disabled.

To answer a ringing call:

1. In the Calls panel, click **Answer** 

To answer an incoming call from a Call Notification pop-up window:

1. Click on the text in the pop-up window

AUTO ANSWER CALLS

This feature is typically used by agents who use headsets with their phones and handle a high volume of calls. It may be enabled either by you in the client or configured in the system by your administrator.

TO ENABLE AUTO ANSWER

1. In the Calls panel, click Auto Answer . The button changes to this  to indicate that Auto Answer is on.

When Auto Answer is enabled, your phone automatically goes off-hook when it is alerted. This applies to both inbound and Click-To-Dial calls.

The Auto Answer feature may be enabled manually in the Call Center client or by the administrator on CommPilot.

Note: If this feature is enabled by your administrator, you must NOT enable the client-based Auto Answer using the Auto Answer button.

END CALL

To end a call:

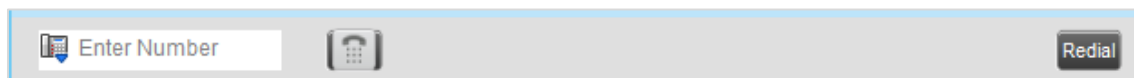
1. Expand the Calls panel
2. Move the mouse over the call and click **End** 

MAKING OUTBOUND CALLS

You can make calls to an ad-hoc number, to a contact from any of your *Contacts* directories, or to a number from Call History. You can also specify the calling line identity to use for your outbound calls.

DIAL AD-HOC NUMBER

You use the *Dialer*, located at the top of the *Call Console* pane, to place a call to an ad-hoc number.



Dialler – Dialling Ad-hoc Number

To dial an ad-hoc number:

1. In the *Dialer*, enter the phone number, press **Enter** or click **Dial** .
The specified phone number is dialed and the call appears in the *Calls* panel.

RE-DIAL NUMBER

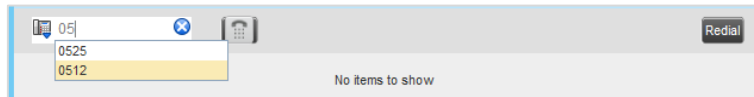
Call Center keeps up to ten most recently dialed numbers, which you can redial using the *Dialer*.

To redial the last number you called:

1. In the *Dialer*, click **Redial** 
The most recently dialed number is called.

To redial one of the recently dialed numbers:

1. In the *Dialer*, place the cursor in the text box and start entering a number.
A list of recently called numbers that start with the entered digits appears.



Dialer – Redialling Number

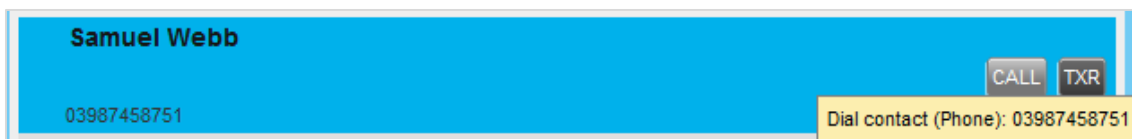
2. Select the number to dial and click **Dial** 

DIAL CONTACT

You can use any directory in the *Contacts* pane to dial a contact.

To dial a contact:

1. In the *Contacts* pane, expand the directory from which you want to dial a contact.
2. Click the target Contact to expand it, click **Call** 



Make a Call

Alternatively, to dial the contact's extension, click Extension 

OR

To dial the contact's mobile number, click Mobile 

The contacts mobile number must be configured in CommPilot in the User's Profile for this action button to display

The phone number is dialed and the call appears in the *Calls* panel.

DIAL FROM SEARCH

You use the *Search* panel in the *Contacts* pane to search for contacts in your *Contacts* directories.

To dial a number from search:

1. Enter the required information into the Search field
2. Press **Enter**
3. Expand the *Search Results* panel for the directory from which you want to select a contact.



Contacts Panel – Search field with results

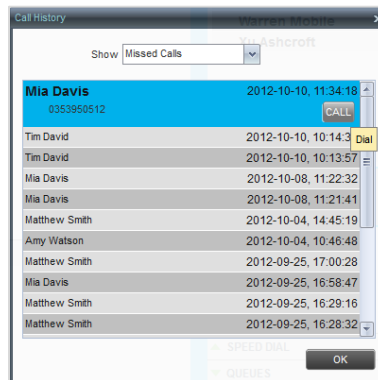
- Click the target contact to expand it and then click **Call** .

DIAL FROM HISTORY

You can dial any number that is available in Call History.

To dial from Call History:

- In the Call Console pane, click **Call History** .



Call History Dialog Box

- From the Show drop-down list, select Missed Calls, Received Calls, or Placed Calls
- Click the call log from which you want to dial and then click the **Call**  button

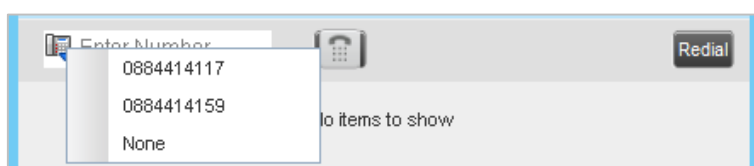
SET YOUR OUTGOING CALLING LINE

As a Call Center supervisor, you can specify whether your direct number or a DNIS number assigned to one of your call centers should be used as your calling line identity when you make calls. This allows you to conduct outbound calling campaigns with an appropriate calling line identity presented to the called party.

This option needs to be configured by your Customer Group Administrator in order to be operational.

To set your outgoing-call identity for the next call:

- In the *Dialler*, click the **Dial As** button  and select the number from the drop-down list. The number you select will be displayed as your CLID when you make the next call.



PLACING CALLS ON HOLD, RESUMING CALLS

You can only put an active call on hold.

Note: When using the Remote Office service, the Hold/Resume buttons are disabled.

PLACE CALL ON HOLD

To place a call on hold:

1. Click **Hold**  for the target call

RESUME HELD CALL

To resume a held call:

1. Click **Answer**  for the target call.

TRANSFERRING CALLS

There are a number of ways in which you can transfer a call - blind transfer, transfer with consultation, and transfer to queue.

BLIND TRANSFER

Use this method to transfer a call to another number without providing an introduction to the destination party.

To blind transfer a call to an ad-hoc number:

1. From the *Call Console* panel, select the call to transfer
2. In the *Dialer*, enter the destination number and click **Transfer** .
The call is transferred and removed from the *Call Console* panel.

To blind transfer a call to a contact:

1. From the *Call Console* panel, select the call to transfer
2. In the *Contacts* pane, expand the panel from which you want to select a contact
3. Click the destination contact and click **Transfer**  for that contact. The call is transferred and removed from the *Call Console*.

TRANSFER WITH CONSULTATION

Use this method to transfer a call with an introduction to the destination party.

To transfer a call with consultation:

1. Make a call to the person to which you want to transfer the call (the original call is automatically placed on hold).
2. Wait until the called party accepts your call and introduce the call
3. When ready to transfer, from the *Call Console* panel, select one of the two calls
4. Move the mouse over the non-selected call and click **Transfer** 
5. The calls are connected and removed from the *Call Console* panel

TRANSFER TO QUEUE

You can transfer a call back to a queue. A transferred call is placed at the bottom of the queue.

To transfer a call to a queue:

1. From the *Call Console* panel, select the call to transfer
2. In the *Contacts* pane, expand the *Queues* panel
3. Click the destination queue and click **Transfer**  for that queue.
4. The call is transferred to the selected queue and removed from the *Call Console*.
5. Alternatively, drag the call onto the target queue and click **Transfer**  for that queue.

ESCALATING/EMERGENCY CALLS

You can escalate calls to the first available supervisor or to a specific supervisor. You can also make an emergency call, which quickly conferences an available supervisor into your call, without placing the remote party on hold.

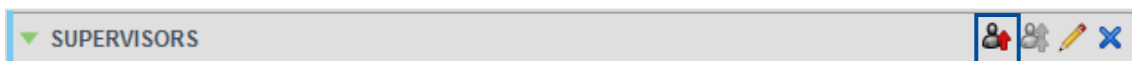
You use the *Supervisors* panel located in the *Contacts* pane to escalate calls.

MAKE EMERGENCY CALL

Use this method to escalate a call to a supervisor in an emergency situation. When you make an emergency call, the caller is not placed on hold; instead, a supervisor is immediately added in to the conference call. You can let the Call Center select the supervisor or select the supervisor yourself. A tone is played to the agent when the supervisor answers an agent's emergency escalate

To make an emergency call to an available supervisor:

1. While on the call, click **Emergency**  in the *Supervisors* panel.



Supervisors Panel – Making Emergency Call

This places the call to the first available supervisor and a conference call is started immediately without putting the caller on hold.

To make an emergency call to a specific supervisor:

1. While on a call, expand the *Supervisors* panel.
2. Click the target supervisor and click the **Emergency** button  for that supervisor. Make sure the supervisor you selected is available.

BLIND ESCALATE CALL

Use this method to escalate a call to a supervisor without consulting the supervisor. You can escalate a call to the first available supervisor or select the supervisor yourself.

To blind-escalate a call:

1. In the *Supervisors* panel, click **Escalate**  to let the system select a supervisor
OR

To select the supervisor yourself, click on an available supervisor and click the **Escalate** button  for that supervisor.
Your original call is placed on hold and a call to the supervisor is initiated.

2. Without waiting for the supervisor to answer, in the *Call Console* panel, select the original call.
3. Move the mouse over the call to the supervisor and click **Transfer** .

ESCALATE WITH CONSULTATION

Use this method to escalate a call to a supervisor and provide an introduction beforehand. You can escalate the call to the first available supervisor or select the supervisor yourself.

To escalate a call with consultation:

1. In the *Supervisors* panel, click **Escalate**  to let the system select a supervisor
OR

To select the supervisor yourself, move the mouse over an available supervisor and click **Escalate**  for that supervisor.

2. Wait until the supervisor accepts your call and speak to the supervisor.
3. When ready to transfer the call, in the *Calls* panel, select the original call.
4. Move the mouse over the call to the supervisor, and click down arrow (if required)
5. Click **Transfer** .

ESCALATE WITH CONFERENCE OR HANDOVER

Use this method to escalate a call to a supervisor through a conference call. You can then leave the call.

To escalate a call with conference or handover:

1. In the *Supervisors* panel, click **Escalate**  to let the system select a supervisor; or to select the supervisor yourself, click an available supervisor and click **Escalate**  for that supervisor.

2. When the supervisor accepts your call, speak to the supervisor about the issue.
3. In the *Call Console* panel, select the original call.
4. Click on the required Supervisor then, click **Conference** . A conference call is established and the calls appear in the *Conference* panel.
5. To hand the call over to the supervisor, click **Leave**  in the *Conference* panel.

ESCALATE WITH MID-CONFERENCE HOLD

Use this method to escalate a call to a supervisor through a conference call and provide an opportunity for the customer to speak to the supervisor.

To escalate a call with mid-conference hold:

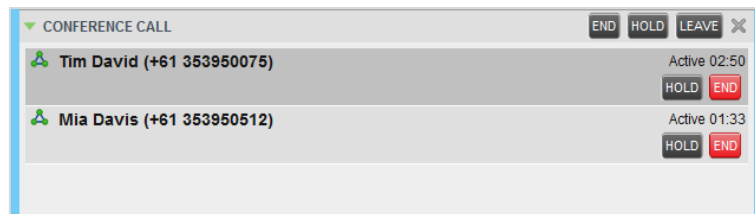
1. In the *Supervisors* panel, click **Escalate**  to let the system select a supervisor
OR
2. To select the supervisor yourself, move the mouse over an available supervisor and click **Escalate**  for that supervisor.
3. When the supervisor accepts your call, speak to the supervisor about the issue
4. In the *Call Console* panel, select the original call
5. Move the mouse over the call to the supervisor and click **Conference** 
6. A conference call is established and the calls appear in the *Conference* panel.
7. In the *Conference Call* panel, click **Hold** . This puts both calls on hold but allows the customer and the supervisor to continue their conversation.
8. To drop a specific party from the conference, select their call from the *Conference* panel and click **End** 
9. To leave the call, click **Leave**  in the *Conference Call* panel.

MANAGING CONFERENCE CALLS

You manage conferences in the *Call Console* pane.

1. You use the *Calls* panel to establish a conference and add participants to it.
2. You use the *Conference* panel to manage or end an active conference call.

You can only have one active conference at a time.



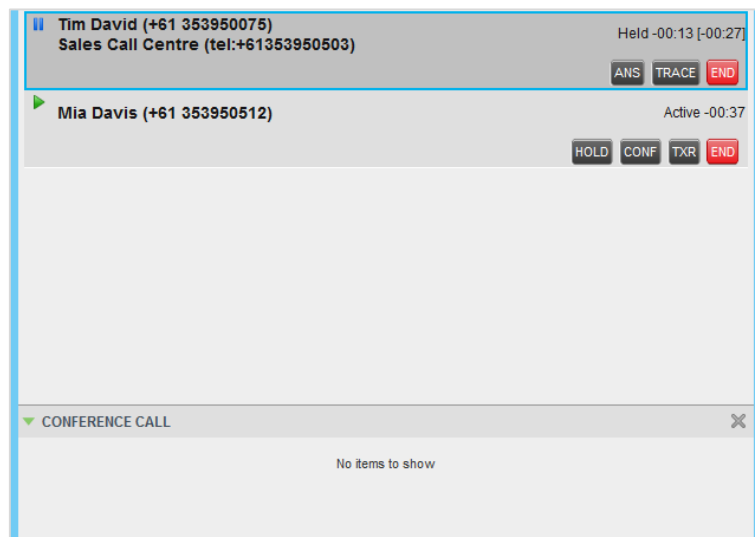
Call Console Pane – Conference Panel

START THREE-WAY CONFERENCE

To start a conference call, you need to have at least two current calls. The calls can be received or made by you. If required, make calls using any of the methods described in section *Making Outbound Calls*.

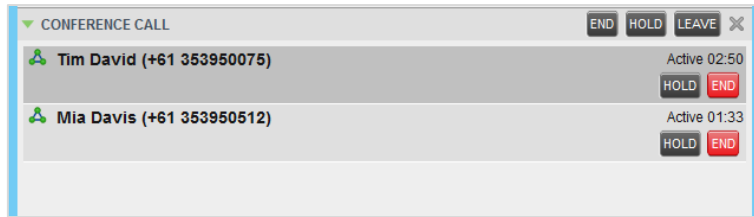
To start a conference:

1. Expand the *Calls* panel and select a call



Calls Panel – Starting Conference Call

2. Move the mouse over a non-selected call and click **Conference**  A three-way conference is established and the connected calls appear in the *Conference* panel



Conference Panel – Conference Call

ADD PARTICIPANT TO CONFERENCE

Note: To add participants to a conference, you need to have the N-Way Calling service assigned.

To add a participant to a conference:

1. If the call you want to add to the conference is not yet established, place the call
2. In the *Call Console* panel, move the mouse over the call and click **Conference** 
The call is added to the conference

HOLD CONFERENCE

To put an active conference on hold:

1. In the *Conference Call* panel, click **Hold Conference** 
This allows other conference participants to continue their conversation

RESUME CONFERENCE

To resume a conference call that you previously put on hold:

1. In the *Conference Call* panel, click **Resume Conference** 
All the calls in the conference become active

HOLD PARTICIPANT

To put a specific conference participant on hold:

1. Expand the *Conference Call* panel
2. Move the mouse over the target call and click **Hold** 

TAKE PARTICIPANT OFF HOLD

To resume a participant's held call:

1. Expand the *Conference Call* panel
2. Move the mouse over the target call and click **Resume** 

LEAVE CONFERENCE

To leave the conference:

1. In the *Conference Call* panel, click **Leave Conference** 
The other parties continue their conversation

Note: This function is only available for three-way conferences.

END PARTICIPANT

To end a selected call in a conference:

1. Expand the *Conference Call* panel.
2. Move the mouse over the call and click **End** 

END CONFERENCE

To end the conference:

1. In the *Conference Call* panel, click **End Conference** 
This will release all the calls that participated in the conference

GENERATING CALL TRACE

Call Center allows you to generate a trace on active, held, released, or missed calls.

Note: Tracing calls needs to be set up with the relevant Telstra division prior to this feature being configured in CommPilot by your Customer Group Administrator (CGA). You must be assigned the Customer Originated Trace service to use this capability. CGA's cannot view the logs of a traced call. Telstra will provide the information to your CGA.

A call trace contains the following information:

- The phone number of the user who initiated the trace.
- The date and time the call was received.
- The identity (name and number) of the caller, if available.

Issuing more than one call trace request has no effect.

GENERATE CALL TRACE FOR SELECTED CALL

To generate a trace for a selected call:

1. Expand the Calls panel.

2. Move the mouse over the target call and click **Trace**  for that call.

GENERATE CALL TRACE FOR LAST RELEASED CALL

You can generate a trace for the most recently released or missed call.

To generate a trace for the last released or missed call:

1. In the *Calls* panel, click **Trace** .

CHAPTER 5

MONITORING SUPERVISORS

The Premium Call Center allows you to monitor the phone state of selected supervisors (up to 50). This is useful when you are escalating a call and want to quickly find a supervisor who is available to take a call.

You use the Supervisors panel to view the phone state of selected supervisors and to select supervisors to monitor. Supervisors who are not monitored have their state set to unknown.



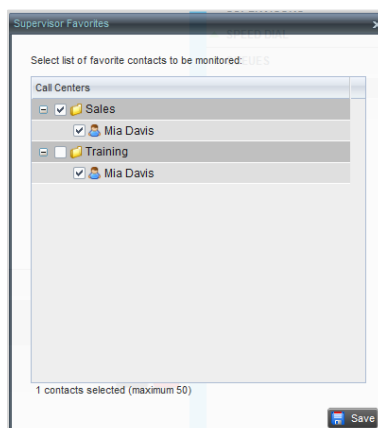
Supervisors Panel

SELECT SUPERVISORS TO MONITOR

The list of selected supervisors is saved on sign-out, as part of your workspace, and restored on subsequent logins.

To select the supervisors to monitor:

1. In the *Supervisors* panel, click **Edit** 



Supervisor Favorites Dialog Box

2. Check the box next to each supervisor to monitor and click **Save**.

A supervisor can be assigned to multiple call centres. Check the box of the call centre the supervisor is monitoring that you are an agent of.

SUPERVISOR PHONE STATES

The following table lists the states a supervisor's phone line can be in:

PHONE STATE	ICON	DESCRIPTION
Idle		Supervisor's phone is on-hook, which means the supervisor is not on a call.
Busy		Supervisor's phone is off-hook, which means that the supervisor is on a call.
Ringing		Supervisor's phone is in alerting state; a call is currently being delivered to the supervisor.
Do Not Disturb		Supervisor has enabled the Do Not Disturb service.
Call Forwarding Always		Supervisor has enabled the Call Forwarding Always service.
Unknown		Supervisor's phone state is currently unavailable or unknown.

CHAPTER 6

MANAGING CALL HISTORY

Call Center collects call logs for your placed, received, and missed calls. You can view, organise, and delete call logs using the Call History feature.

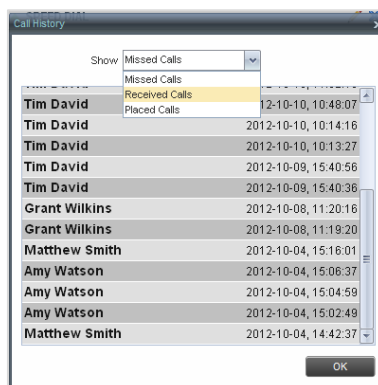
You can call any number available in Call History.

VIEW CALL HISTORY

You can view your Placed, Received, and Missed calls.

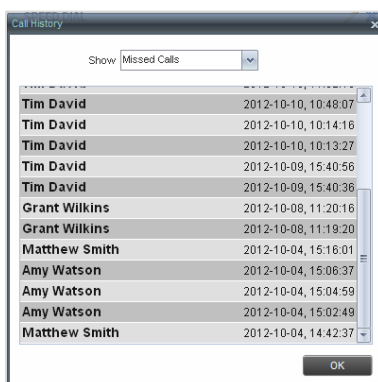
To view your call history:

1. In the *Call Console* panel, click **Call History** 
By default the calls are grouped into Placed, Received, and Missed calls.



Call History Dialog Box

2. To show calls in a specific group, select that group from the *Show* drop-down list.



Missed Calls - Call History Dialog Box

CHAPTER 7

E-MAILING CONTACTS

Call Center allows you to send an e-mail message to a contact that has e-mail configured in their User Profile in CommPilot. You must also have messaging enabled within Call Center settings. For information, see 0 Settings – Messaging Settings – Messaging.

The **E-mail** button appears when you select a contact that has e-mail configured.

SEND E-MAIL MESSAGE TO CONTACT

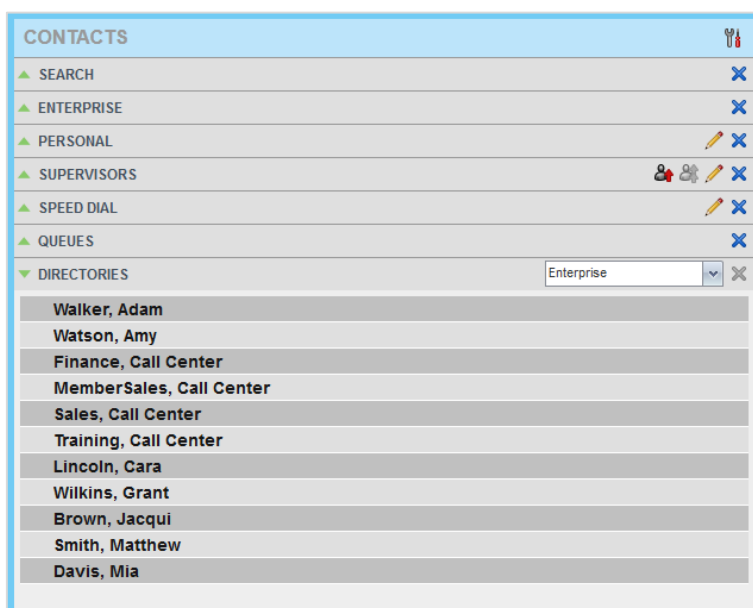
To send an e-mail message to a contact:

1. In the *Enterprise* directory move the mouse over a contact that has e-mail address
2. Click **E-mail**  this brings up a new e-mail window for the configured messaging service.
3. Write your message and click **Send**.

CHAPTER 8

MANAGING CONTACTS

Use the *Contacts* pane to perform call and monitoring operations on your contacts and to manage your contacts directories.



Contacts Pane

Call Center provides access to the following contact directories:

INTERFACE ELEMENT	DESCRIPTION
Enterprise	The Enterprise directory contains the contacts in your TIPT enterprise.
Personal	The Personal directory contains all contacts in your Personal Phone List on TIPT.
Speed Dial	The Speed Dial directory contains the numbers configured for you or by you for your Speed Dial services (Speed Dial 8 and/or Speed Dial 100).
Queues	The Queues directory lists the call centres you are either supervising or staffing. It allows you to quickly transfer calls to queues.

Access to certain directories such as Outlook and LDAP depends on your permissions and the system setup.

For information about the operations you perform to manage your contact directories, see the following sections:

- Viewing Contacts

- Organising Contacts
- Searching for ContactsManaging Speed Dial
- Managing Personal Contacts

Note: Personal contact can only be modified if the name, when being entered accidentally included a ' / ' or the number entered is less than two digits

VIEWING CONTACTS

Call Center allows you to select directories to display in the *Contacts* pane, show or hide directory contents, and select display order of information in certain directories.

SHOW OR HIDE DIRECTORIES

You can decide which of the directories that you are allowed to access appear in the *Contacts* pane.

To display or hide a directory:

1. In the *Contacts* pane, click **Options** .
2. Select *View, Directories*, and then select or unselect the directory to display/hide. To display all directories, select *All*.
3. To hide a directory, you can also click the **Close** button  for that directory.



Contacts Pane – Show/Hide Contact Directories

SHOW OR HIDE DIRECTORY CONTENT

By default, your directories are collapsed, with only the title bar visible. You can selectively expand the directories that you want to use.

To show or hide contacts in a directory:

1. In the *Search* pane, click the **Show/Hide** button for that directory. .

SHOW HIDE CONTACT DETAILS

You can view the details of a contact in the directories.

To view contact details:

1. In the *Enterprise* directory, click on the contact. The entry expands displaying the contact's phone numbers configured in that directory. To minimise the agent's details, click on the agent again.



Enterprise Panel – Contact Details

SELECT DISPLAY ORDER

Contacts in the *Group/Enterprise*, *Agents*, and directories can be displayed either by their first name or last name. Your selection applies to all those directories. You cannot specify the display order for each directory individually.

To specify the contacts' display order:

1. In the *Contacts* pane, click the **Options** button 
2. Select *View*, then *Display Name*, and then the order by which you want to display contacts: *Last Name*, *First Name* or *First Name, Last Name*.



Contacts Pane – Displaying Contacts by First Name, Last Name

ORGANISING CONTACTS

SORT CONTACTS

You can sort contacts in the following directories: *Enterprise*, *Queues*, and *Agents*.

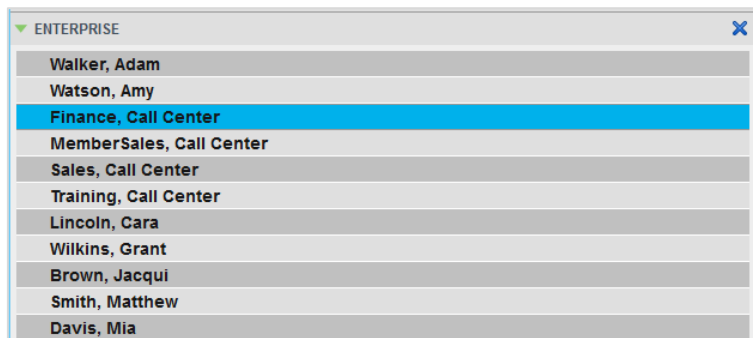
To order contacts in a directory:

1. In the *Contacts* pane, click **Options** 
2. Select *Sort*, then the name of the directory for which you want to sort contacts, and then the sorting option.



Contacts Pane – Sorting Contacts

The screen below shows the directory sorted by the contact's First name.

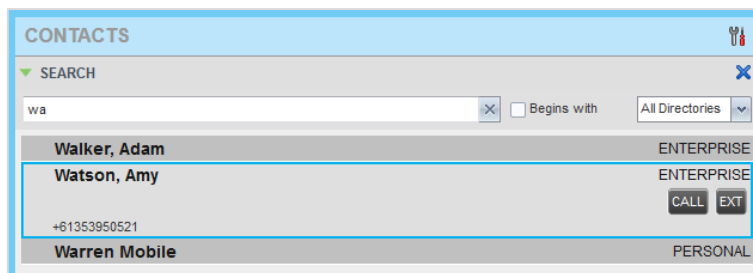


Directory Panel – Contacts Sorted

SEARCHING FOR CONTACTS

Call Center provides you with a search function that allows you to search for specific contacts in your directories.

You use the *Search* panel in the *Contacts* pane to look for contacts.



Contacts Pane – Search Panel

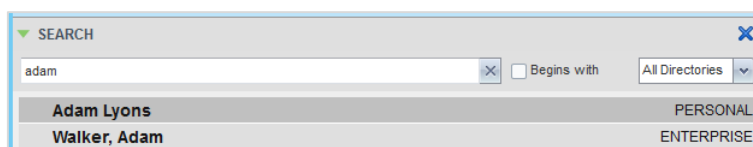
PERFORM CONTACT SEARCH

To search for contacts:

1. In the *Search* text box enter the text you want to search for and press ENTER.
You can enter partial information, such as part of a name or phone number

For example, if you do not remember whether Mary's last name is spelled "Shelley" or "Shelly", you can enter "Shell", and either name is returned.

The search is not case-sensitive. The text you enter is matched against all attributes of every entry in the selected directories. Search results are displayed into a single area.



Contacts Pane – Search Results

To view the search results for a specific directory:

1. click the **Search Results** panel for that directory

Depending on the Call Center setup, search returns either all the contacts (in the selected directories) that contain the entered keyword or all the contacts that start with the entered keyword.

In the first case (Contains), entering “Ann” and selecting “First Name” from the Keyword Search Filter drop-down list returns all contacts with the first name “Ann”, but it also returns all contacts with first names such as “Anne”, “Marianne”, “Marie Ann”, “Ann Marie”, and so on.

In the second case (Starts With), entering “Ann” and selecting “First Name” returns all contact with the first names such as “Ann”, “Anne”, and “Ann Marie”, but not “Marianne” or “Mary Ann”.

1. To clear the search results, click **Reset**



Note 1: Directories are searched in the following order: Supervisors, Agents, Enterprise. Duplicate search results in TIPT directories are not displayed; the first match for a given contact is displayed.

Duplicate search results in other directories are displayed

Note 2: Contact entries displayed in search results follow the same rules as if that entry was accessed in their own directory. This allows you to perform any operations you need directly from the search results.

MANAGING PERSONAL CONTACTS

You can add or remove personal contacts via CommPilot or in Call Center, and the updates appear in both places. The updates you make via CommPilot appear only in Call Center at the next sign in.

To update personal contacts using the client, you can perform the following operations:

- Add Personal Contact
- Modify Personal Contact
- Delete Personal Contact

ADD PERSONAL CONTACT

To add a personal contact:

1. In the *Personal* panel, click **Edit**



2. Click **Add**.

A new line is added below the existing entries, allowing you to define a new entry

Name	Number
Adam Lyons	0458796541
Samuel Webb	03987458751
Taxi	132132
Warren Mobile	0419390502
Xu Ashcroft	089874561222

Warren Mobile

+ Add X Delete

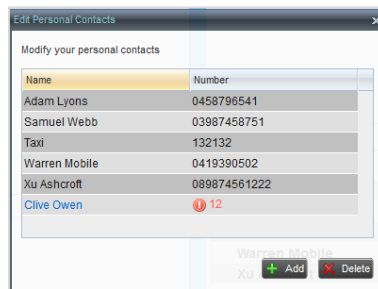
Edit Personal Contact Dialog Box – Adding Entry

3. In the *Name* text box, enter the contact's name or description as you want it to appear in the contacts list
4. In the *Number* text box, enter the phone number of the contact
5. Close the dialogue box to save the entry or Click Add to Save the current and add another new entry

MODIFY PERSONAL CONTACT

Personal contacts can only be modified if the name, when being entered accidentally included a '/' or the number entered is less than two digits To modify a personal contact.

1. In the *Personal* panel, click **Edit** 
2. **Double-click** the entry to modify
The entry becomes modifiable.



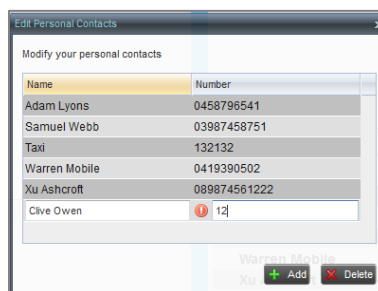
Edit Personal Contact Dialog Box – Modifying Entry

3. Modify information as required
4. Close the dialogue box to save the changes

DELETE PERSONAL CONTACT

To delete a speed dial entry:

1. In the *Personal* panel, click **Edit** 
2. Select the entry to delete and click **Delete**
3. Click **X** to save the action and close the dialogue box



MANAGING SPEED DIAL NUMBERS

You can add or remove Speed Dial numbers via CommPilot or in Call Center, and the updates appear in both places. The updates that you make via CommPilot appear only in Call Center at the next sign in.

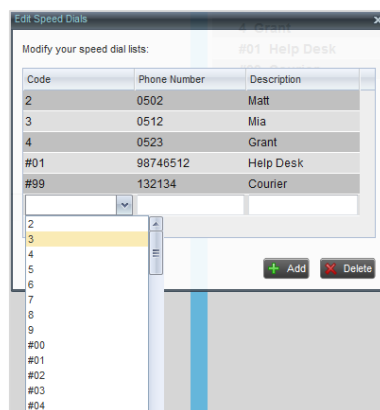
To update speed dial entries using the client, you can perform the following operations:

- Add Speed Dial Entry
- Modify Speed Dial Entry
- Delete Speed Dial Entry

ADD SPEED DIAL ENTRY

To add a speed dial entry:

1. In the *Speed Dial* panel, click **Edit** 
2. Click **Add**. A new line is added below the existing entries, allowing you to define a new entry



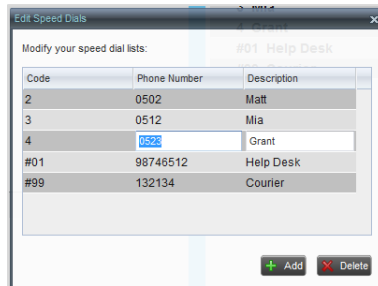
Edit Speed Dials Dialog Box – Adding Entry

3. From the code drop down list, select a speed dial code.
4. In the phone Number text box, enter the phone number to assign to the code.
5. In the description text box, enter a description that will allow you to identify the entry.
6. Close the dialogue box to save the entry

MODIFY SPEED DIAL ENTRY

To modify a speed dial entry:

1. In the *Speed Dial* panel, click **Edit** 
2. **Double-click** the entry to modify
The entry becomes modifiable.



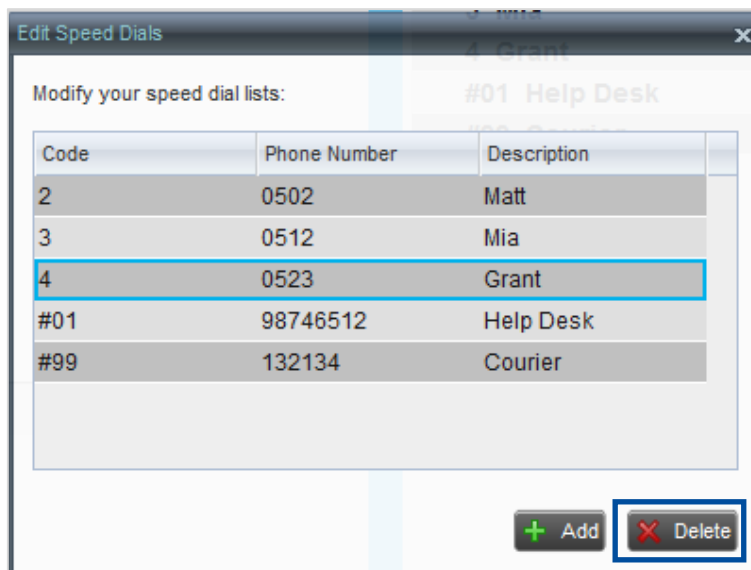
Edit Speed Dials Dialog Box – Modifying Entry

3. Modify information as required
4. Press **Enter** to save the information just modified
5. Close the dialogue box

DELETE SPEED DIAL ENTRY

To delete a speed dial entry:

6. In the *Speed Dial* panel, click **Edit** 
7. Select the entry to delete and click **Delete**.



Edit Speed Dials Dialog Box – Deleting Entry

8. Close the dialogue box to save the change

CHAPTER 9

MANAGING THE DASHBOARD

The Dashboard pane displays an overview of queue activity for agents.

Dashboard 			
PremiumCallCentre			
Service Mode :None			
Current Calls in Queue	0/1	Longest Waiting Call	00:00
EWT	07:33	AHT	07:33
ASA	00:00	Staffed	1/3
TEAC Call Centre			
Service Mode :None			
Current Calls in Queue	0/3	Longest Waiting Call	00:00
EWT	00:00	AHT	00:00
ASA	00:00	Staffed	2/2

Dashboard

The information displayed is:

Queue Name – Name of the queue

Service Mode - Current mode of service

Current Calls in Queue – current number of calls in the queue. This is a ratio actual number of calls/queue length

Longest Waiting Call – The amount of time the oldest call has been in the queue

EWT – Estimated Wait Time, the estimated time it will take for calls to be answered once they are in the queue

AHT – Average Handling Time, the average time it takes to process a call in the queue (the time from when a call is ringing into the queue to being hung up)

ASA – Average Speed of Answer, the average time it takes for a call to be answered by an agent once the call has been presented to the agent

Staffed - Number of agents available in the queue. This is a ration of actual number of agents/number of agents assigned to the queue

If thresholds have been set for the call centre/s displayed the dashboard will show the visual indicators.

Account			
Current Calls in Queue	8/10	Longest Waiting Call	06:10
EWT	01:55	AHT	01:45
ASA	00:16	Staffed	3/9
Technical			
Current Calls in Queue	2/20	Longest Waiting Call	00:00
EWT	04:30	AHT	04:30
ASA	00:15	Staffed	1/5
CustomerSupport			
Current Calls in Queue	16/500	Longest Waiting Call	01:10
EWT	00:40	AHT	00:20
ASA	00:15	Staffed	25/100
Finance			
Current Calls in Queue	10/50	Longest Waiting Call	02:35
EWT	00:06	AHT	02:00
ASA	00:06	Staffed	10/20
Sales			
Current Calls in Queue	0/10	Longest Waiting Call	00:00
EWT	00:00	AHT	00:00
ASA	00:00	Staffed	1/1

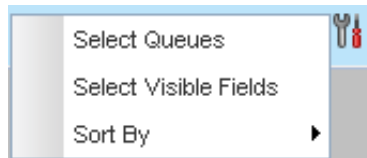
Agent Dashboard showing Visual Threshold Indicators in Red and Yellow

QUEUE	THRESHOLD TYPE	THRESHOLD SEVERITY	THRESHOLD COLOUR
Queue (Account)	Longest Waiting Call	2	Red
Queue (Account)	EWT	1	Yellow
Queue (Technical)	EWT	2	Red
Queue (Technical)	AHT	2	Red
Queue (Customer Support)	EWT	1	Yellow
Queue (Finance)	Longest Waiting Call	1	Yellow

SELECT QUEUES FOR THE DASHBOARD

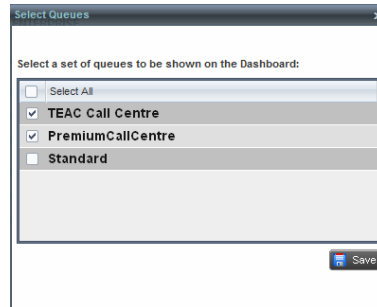
To select the queues to view in the Dashboard:

1. Click on **Options** 
2. Click on **Select Queues**



Dashboard Options

3. Check the box for the required queues and click **Save**



Queue Select

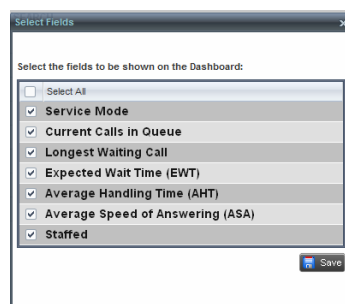
SELECT VISIBLE FIELDS

1. Click on **Options** 
2. Click on **Select Visible Fields**



Dashboard Options

3. Check the box for the required queues and click **Save**



Queue Select

CHAPTER 10

GENERATING REPORTS

The Premium Call Center provides reporting functions to agents and supervisors. Agents can only generate reports about their own activity whereas supervisors have access to reports on activity and performance of agents and call centers under their supervision.

The Premium Call Center supports Enhanced Reporting.

ENHANCED REPORTS

The Enhanced Reporting feature enhances the reporting capabilities of the TIPT Premium Call Center solution.

Enhanced Reporting allows you to run reports and schedule reports to run in the future using pre-defined templates. Reports can be of type *Agent* or *Call Center*.

The report templates available to you depend on how your administrator has configured your system. Report templates cannot be amended or customised.

You use the Reports link at the top of the main interface to access pages used to generate and schedule Enhanced reports.



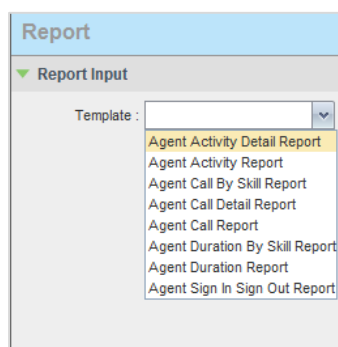
Main Interface (Top of Window)

This section provides an example of an Enhanced report. For the list of canned report templates available on TIPT for report generation as part of Enhanced Reporting, see the *TIPT Call Center Reporting Guide*.

RUN ENHANCED REPORT

To run a report:

1. Click the **Reporting** link at the top right of the main window.



2. Select a report template from the drop-down list
Fill in the required information. The input that you need to provide depends on the template you select and the report type.

The following table explains all the input parameters for Enhanced reports, Agent and Call Centre. Not all fields appear on all reports.

INPUT FIELD	DESCRIPTION	ALLOWED VALUE
Scope	For Agent reports, it allows you to specify the agents to include in the report. You can check All Agents or Agents. If you check Agents, select agents from the drop-down list. Note: This parameter is disabled when an agent runs the report, since agents can only run reports about themselves.	All Agents, Agents
	For Call Center reports, it specifies the call centres to include in the report. You can check All Call Centers, Call Center. If you check Call Center, select call centers from the drop-down list.	All Call Centers, Call Center
Call Completion	This setting is used to count the number of ACD calls an agent has completed within a service level during the specified interval. The Call Completion service level can be set to 1 through 7200 seconds.	1-72000
Short Duration	This setting is used to count the number of ACD short duration calls completed by an agent during an interval. You can set the maximum length of a short duration call to 1 through 7200 seconds.	1-7200
Service Level	This setting allows you to provide up to five service levels, used to perform service level calculations for each call centre. Each service level can be set to 1 through 7200 seconds.	1-7200
Service Level Options	These settings are used to determine whether certain types of calls should be included in the service level calculations: • Check <i>Include overflow time transfers in service level</i> to include calls transferred due to time overflow. • Check <i>Include other transfers in service level</i> to include calls transferred for other reasons. • Select one of the following options for abandoned calls • <i>Ignore all abandoned calls</i> to exclude all abandoned calls • <i>Include all abandoned calls</i> to include all abandoned calls • <i>Include all abandoned calls except before entrance completes</i>	These options can be checked or unchecked.

INPUT FIELD	DESCRIPTION	ALLOWED VALUE
	to include calls abandoned after the entrance message has finished playing • <i>Include all abandoned calls except in interval</i> to include calls abandoned after the time specified by the Abandoned Call Interval parameter.	
Abandoned Call Interval	If you selected the Include all abandoned calls except in interval option, enter the desired interval in this text box in seconds.	1-7200
Service Level Percentage	This setting allows you to specify the service-level objective (expressed as percent of calls).	
Type	This can be checked as Historical or Real Time. • Historical reports show data from the assigned start date to the assigned end date. • Real-time reports show data from the assigned start date to the present, with the current interval refreshed with real-time data. Real-time reports for individual agents contain data for each time interval, with the last interval reflecting real-time data, if requested (subject to the refresh rate). When the interval switches over, the final data for the last time period is captured and shown as historical data, and real-time data is reflected in the new time interval.	Historical or Real-time
Start Date	This is the date you want the report to start from. It can be set by typing in the text box or clicking the Calendar icon. This is compulsory. The oldest historical date depends on the interval selected: • 180 days of half-hour interval statistics • 365 days of hourly interval statistics • 730 days of daily interval statistics	MMM DD, YYYY
Start Time	This is the time when you want the report to start from. You can select the hour format (A.M., P.M) from the Hour Selection Type. Time is applicable for hourly and minute intervals only.	1-12 AM/PM or 00-23 hr
End Date	This is the date when you want the report to end. It can be set by typing in the text box or clicking the Calendar icon. This is compulsory when a Historical report is selected.	MMM DD, YYYY
End Time	This is the time when you want the report to end. You can select the hour format (A.M., P.M.) from the Hour Selection Type. Time is applicable for hourly and minute intervals only. This is compulsory if a Historical report is selected.	1-12 AM/PM or 00-23 hr

INPUT FIELD	DESCRIPTION	ALLOWED VALUE
Sampling	The sampling period is only applicable to interval-based report templates and determines how the report information will be presented. For example, an hourly report displays information for each hour of the report timeframe.	15 mins, 30 mins, Hourly, Daily, Weekly, Monthly
Output Format	This allows you to specify in what format you would like the report output to be generated. If you select HTML or PDF the report is displayed in the report window. If you select CSV, a file is created that you can save on your computer.	PDF, CSV, HTML

3. Click **Run Report**.

The results of the report are displayed in the *Report Output* area of the window.

Report Results (Example)

Depending on the report type, the report results can contain the following elements: a pie chart, a bar chart, a table, a high-water marks table, and a line chart (see examples on the next page).

If you selected HTML or PDF report format when requesting a report, the report is displayed in the report window. If you select CSV, a file is created that you can save on your computer.

This section provides an example of an enhanced report: Abandoned Calls report. For details on the reports available in Call Center, see the *TIPT Call Center Reporting Guide*.

The results of the Abandoned Calls report are presented in a bar chart and table.

Telstra IP Telephony

Call Centre

Report

▼ Report Input

Template :

Abandoned Call Report

Scope : ☒ All Call Centers ☐ Call Center ☐ DNIS

Hide Performance Parameters...

Service Level :

30

Abandoned Call Threshold :

1

5

10

20

Type : ☒ Historical ☐ Real time ☐ Scheduled

Start Date :

07/01/2012

 Start Time :

12:00am

HH:MM [am|pm]

End Date :

09/30/2012

 End Time :

12:00am

HH:MM [am|pm]

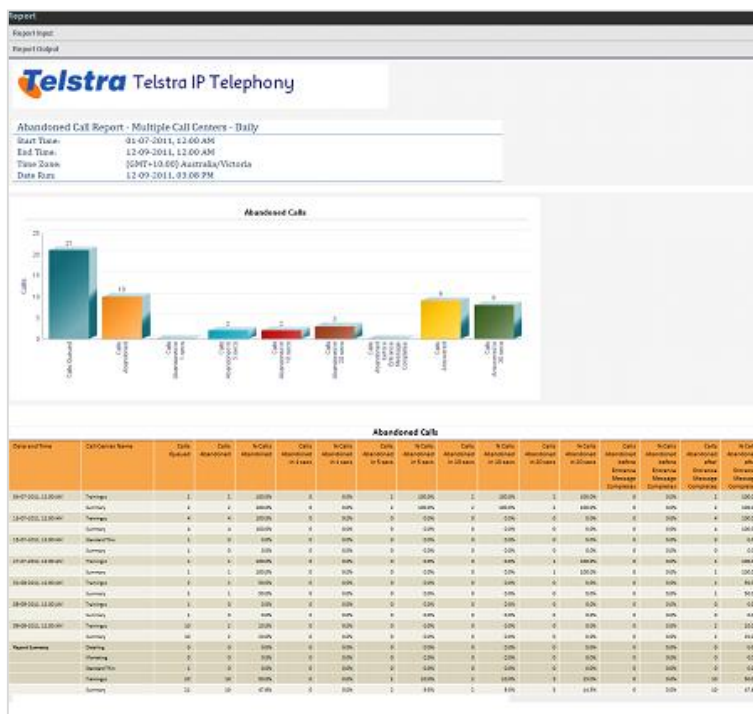
Sampling :

Daily

Output Format :

HTML

Run Report



CHAPTER 11

CONFIGURING AGENT

You use the *Settings* page, accessed via the Settings link at the top right of the main page to configure various aspects of the Call Center application.



To return to the main interface, click the **Back To Application** link.



Note: Do not use the internet browser's Back button to return to the main interface.

This section provides information about the options that you can set to configure Call Center.

- Settings – General
- Settings – Application
- Settings – Services
- Settings – Plug-ins
- Settings – Messaging
- Settings – Report
- Settings - About

SETTINGS – GENERAL

You use the *General* tab to configure miscellaneous settings that improve the usability of Call Center.

Setting – General

The following subsections describe the settings that can be configured on this page.

ACCOUNT

You use this area to change your TIPT password.

Call Center shares logon credentials with TIPT. When you change your password in Call Center, remember to use this new password when accessing your web portal.

Note 1: The password you enter has to meet password requirements set on TIPT.

Note 2: To ensure secure access, Change Password functionality is only available if HTTPS is used to communicate with the system.

To change your password:

4. Click the **Change Password** link. The section expands allowing you to change your password.

5. Enter your current and new password and click **Change Password**.

Note: The Reset button does not reset your password. It only clears the input boxes.

HOTEL GUEST

This setting allows you to configure the Hoteling guest, which is required when you use Call Center from a Hoteling desk/device. This way you do not need to enter this information every time you sign in to Call Center, provided that you use the same Hoteling device.

1. In the text box, enter the username of the Hoteling host that corresponds to the desk/device you are using, for example, "03xxxxxxxx@acme.com".

SCREEN POP

This feature is currently unavailable.

DATE FORMAT

The following settings allow you to configure date and time formats used in reports as well as the day of the week to start reports.

- **Date Format:** This setting allows you to select the format for displaying dates in reports. The format is used for all dates that are included in the generated report.

TIME FORMAT

- **Time Format:** This setting allows you to select the format for displaying time in reports. The format is used for all times that are included in the generated report.
- Note that this setting does not impact the format of events durations, which are always reported in the "DD:HH:MM:SS" format in the generated reports.

WORKSPACE

Call Center allows you to customise elements of your workspace, such as the size and placement of windows on the desktop. The system remembers the setup between sessions.

The following elements can be customized:

- The size and position of the web browser window in which the main interface is displayed.
- The size of the panes (Call Console, Contacts, and Queued Calls).
- The size and position of the *Dashboard* window.
- The size and position of any report window.

Note: The Position functionality does not work in Internet Explorer, due to a technical limitation of Internet Explorer.

Save Workspace: This button, when clicked, saves the current workspace.

Load Workspace: This button, when clicked arranges your workspace according to the last saved configuration.

Restore To Default: This button, when clicked restores the workspace to the system default configuration.

Always save workspace on signout: When you sign out from the client, Call Center asks you whether you want to save your current workspace. To save your workspace automatically when signing out, without being asked, check the *Always save workspace on signout* box.

To customise your workspace:

1. Arrange the windows the way you like
2. Click the **Save Workspace** button to save the current configuration. To restore the system default, click **Restore To Default**
3. At any time to return to the last saved configuration, click the **Load Workspace** button

SETTINGS – APPLICATION

You use the *Application* tab to configure your application settings. The settings are different for agents and supervisors. They are described in the following subsections.

Queue	Number	Wrap-Up Policy
☒ Sales	0353950503	1:00
☐ Training	0353950513	1:00

Agent Policies

Post Sign-In ACD State : Available

Post Call ACD State : Wrap-Up

☒ Set Wrap-Up timer to 1 : 0 for queues without a policy

☐ Outgoing calls as call center

Outbound Caller Id :

Settings – Application

QUEUE MEMBERSHIPS

These settings allow you to select the call center queues you wish to join.

- To join a call center queue, select the check box on the line for the call center
- To join all queues, select the check box in the header

☐ Queue	Number	Wrap-Up Policy
☒ Sales	0353950503	1:00
☐ Training	0353950513	1:00

Note: If you are not allowed to join/leave a queue, the line for the queue is greyed out, and you can only view your join status in the queue. Contact your administrator to change your join status in a queue.

You can select columns to display for queues listed on this page, and sort and group queues by any column.

If you are a member of a call centre that uses skills based routing, the skill level will be displayed

☐ Queue	Number	Wrap-Up Policy	Skill Level
☒ PremiumCallC...	08844141116	1:00	1

Queue with Skill based routing level

AGENT POLICIES

You use *Agent Policies* settings to specify your post sign-in ACD state, post call ACD state, wrap-up timer, and outbound CLID:

Agent Policies

Post Sign-In ACD State : Available

Post Call ACD State : Wrap-Up

☒ Set Wrap-Up timer to 1 : 0 for queues without a policy

☐ Outgoing calls as call center

Outbound Caller Id :

- **Post Sign-In ACD State:** To configure your post sign-in ACD state, select a state from the *Sign-In State* drop-down list. Your ACD state is automatically set to the selected state when you sign in to Call Center.
- If you selected *Unavailable* and unavailable codes are enabled for your organization, select an unavailable code from the drop-down menu.

- **Post Call ACD State:** To configure your post-call ACD state, that is your ACD state upon completion of a call, select a state from the *Post Call State* list.
- If you selected *Unavailable* and unavailable codes are enabled for your organization, select an unavailable code from the drop-down menu. In most cases, when you select *Wrap-Up*, you must also configure your wrap-up timer.
- **Set Wrap-Up Timer to:** To set your post-call wrap-up timer, check the *Set Wrap-Up timer to <mm:ss> for queues without a policy* box and enter the time in minutes and seconds. Your ACD state automatically changes from *Wrap-Up* to *Available* after the specified period of time.
- **Make outgoing calls as call center:** Check this box to display a call center CLID instead of your phone number when you make a call.
- **Outbound Caller ID:** If you checked *Make outgoing calls as call center*, select the number to use from the drop-down list.

Note: Your post-call wrap-up timer setting may be overridden if your administrator sets the timer to a smaller value in CommPilot.

SETTINGS – SERVICES

You use the *Services* tab to configure various services assigned to you by your administrator on TIPT and integrated with Call Center. Those settings are only available if you have been assigned such services. For more information, see your administrator.

The services are grouped into two categories: Active and Inactive.

The screenshot shows the 'Settings – Services' window. The 'Services' tab is active, displaying a list of services under the 'Inactive' category. The services listed are 'Do Not Disturb' (Blocks all calls and sends them to voice mail) and 'Call Forwarding Always' (Forwards all calls to a destination). Below the list is a 'Service Settings' section with a description: 'Automatically forward your incoming calls to your voice messaging service, if configured, otherwise the caller hears a busy tone'. There are checkboxes for 'Active' and 'Ring Splash'. At the bottom are 'Save' and 'Cancel' buttons. A footer bar says 'Manage your service settings'.

Settings – Services

The services that you can configure (if you have been assigned the services) are:

- **Do Not Disturb:** When you activate this service, you are not available to take calls and all your calls are automatically sent to your voice mail.
- **Call Forwarding Always:** When you activate this service, you need to provide the phone number to forward your calls to. When the service is active, all your calls are forwarded to the specified number.

To activate a service:

1. Select the service and check the *Active* box.
The service is moved from the *Inactive* to *Active* category
2. If you enabled the Call Forwarding Always service, in the *Forward To* box, enter the number to forward your calls to
3. To generate a ring splash for incoming calls, check the *Ring Splash* option
4. To save your changes, click **Save**

SETTINGS – PLUG-INS

You use the *Plug-ins* tab to configure the plug-in software used by Call Center to provide functionality such call notification, program shortcuts, and call log.

The screenshot shows the 'Plug-ins' configuration window. The 'Plug-ins' tab is selected. The window is divided into several sections:

- Notification:** Contains two checked checkboxes: 'Focus window for incoming calls' and 'Show notifications for calls'. The 'Show notifications for calls' dropdown is set to 'always'.
- Microsoft® Outlook®:** Contains a 'Disable Outlook Integration' button, a 'Retrieve contacts from:' dropdown set to 'Default Contact Folder', and a checked checkbox 'Use Outlook contacts as preferred CLID lookup'.
- LDAP v3:** Contains an 'Enable LDAP Integration ...' button, input fields for 'ldap://core.adir.tektron.com:389' and 'o=People,o=User Profile,dc=...', a checked checkbox 'Encrypt Connection', and a text field 'cn=_SEARCH_TEXT_'. Below is an 'Attribute Mapping' table:

Remote Attribute	Local Attribute
cn	cn
sn	sn
displayName	displayName
telephoneNu...	telephoneNu...
mobile	mobile
homePhone	homePhone

 Below the table are checkboxes for 'Authentication Required' (checked) and 'DN: CN=1010425,O=User A...', and a 'Password:' field with masked characters.
- Program Shortcuts:** Contains 'Add Shortcut' and 'Remove Shortcut' buttons.
- Activity Archive:** Contains a 'Disable Call Center Log Integration' button, a 'Rotate Log:' dropdown set to 'weekly', and a link 'Open log location'.

NOTIFICATION

These options control when and how call notifications are displayed. The options you can set are as follows:

- **Focus window for incoming calls:** When this option is checked and the browser window running Call Center is minimized. To restore the Call Centre window, click the “T” icon in the task bar.
- This does not work in Firefox. In Internet Explorer, you have to have only one tab open in the web browser running Call Center.
- **Show notification for calls:** When this option is checked, Call Center displays the Call Notification pop-up window on top of other applications’ windows when you receive a call. When you check this box, you need to select an option from the drop-down list to specify the condition under which notifications are displayed.

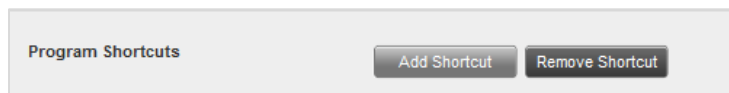
This does not work if other tabs are open in the same web browser window as Call Center. Also, if calls come within eight seconds of each other, the Call Notification pop-up window appears only for the first call of that series.

PROGRAM SHORTCUTS

You use the *Program Shortcuts* settings to create Call Center shortcuts on your desktop for convenient access to Call Center.

The program shortcuts plug-in allows for the creation of desktop shortcuts on a Windows platform, which when clicked, launches the applications in your default web browser.

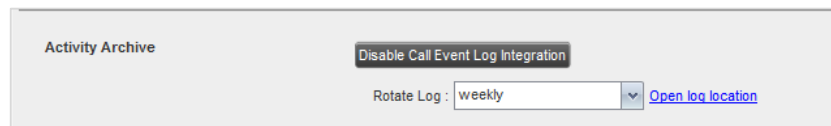
- **Add Shortcut:** This button, when clicked, creates a Call Center shortcut on your desktop.
- **Remove Shortcut:** This button, when clicked, removes the previously created Call Center shortcut. If you did not create a shortcut using the *Add Shortcut* button, the *Remove Shortcut* button has no effect.



Settings – Plug-Ins Short Cut

ACTIVITY ARCHIVE

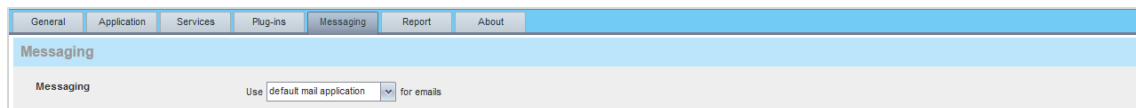
This plug-in software provides the ability to store call event statistics content locally on your computer.



- **Enable/Disable Call Event Log Integration:** This double-action button allows you to enable or disable call log archival on your computer.
- **Rotate Log:** This parameter allows you to specify the frequency with which the call log is rotated. You select the frequency from the drop-down list.
- **Open Log Location:** Click this link to go to the place on your computer where the log is stored.

SETTINGS – MESSAGING

The *Messaging* tab allows you to configure various messaging options for Call Center. Currently, only e-mail messaging is supported.



Settings – Messaging

1. From the drop-down list, select the mail client to use for e-mails
If you selected the custom SMTP option, you also need to configure the following options:
 - **Display Name:** This is the name that will be displayed in the *From* field
 - **Reply-to Address:** This is the address where reply messages can be sent
 - **Default Subject:** This is the subject that will appear when you generate and e-mail message in Call Center
 - **SMTP Host:** This is the IP address of the SMTP host

- **SMTP Port:** This is the port of the SMTP host
- **Outgoing SMTP Server requires Authentication:** When this option is set, authentication is required to send e-mails
- **Username:** This is the name you must enter to authenticate yourself
- **Password:** This is the password part of your authentication credentials
- **Mail Type:** This is the type of mail to use
- **Mail Template:** This is the mail template to use

SETTINGS – REPORT

You use the *Report* tab to configure values to be used as default input parameters for generating reports. If you do not provide any values, system defaults are used. You can change those values as required when generating reports.

Settings – Report

DEFAULT THRESHOLDS

These settings allow you to configure the thresholds that will be used by default when you generate reports that require you to provide thresholds. This is useful, if you often use the same threshold values. You can always change a default value, when required.

- **Call Completion:** This setting is used to count the number of ACD calls an agent has completed within a service level during the specified interval. The Call Completion service level can be set to 1 through 7200 seconds.
- **Short Duration Call:** This setting is used to counts of the number of ACD short duration calls completed by an agent during an interval. You can set the maximum length of a short duration call to 1 through 7200 seconds.
- **Default Start Day of Week:** This setting applies to interval-based reports, when the selected sampling period is “Weekly”. It can be set to any day of the week.

SETTINGS – ABOUT

You use the *About* tab to view the information about Call Center.



Settings – About

The following information is provided on this page

Version: This is the name and software version of TIPT Call Center client.

Profile: This is the Call Center client profile used.

Disclaimer: This is the Call Center copyright information.

CHAPTER 12

APPENDIX A: GLOSSARY AND DEFINITIONS

ACD STATES

ACD states specify the agent's availability to take calls. The possible call states are as listed in the following table.

An agent can be in one of the following ACD states:

ACD STATE	ICON	DESCRIPTION
Available		Agent is available to receive ACD calls. (Agent can also receive direct calls.) This is the primary ACD state of an agent during the workday. It indicates that the agent is at their workstation and either ready to take a call or on an active call. ACD calls may be delivered to an agent who is in an Available state. TIPT uses both the ACD state and the phone state of the agent to determine whether to route a call to the agent. By default, agents receive calls when they are available and their phone is Idle. However, this behaviour can be overridden if Call Waiting on agents is enabled for the call center, which allows for new calls when the agent is available and on an active call.
Unavailable		Agent is unavailable to receive ACD calls. (Agent can still receive direct calls.) The Unavailable state should be used when the agent is away from their workstation and not available to take calls. ACD calls are not delivered to agents in an Unavailable state. This state should be used when the agent is at lunch, on a break, in a meeting, or engaged in some other activity while they are at work, but unavailable to take calls.
Wrap-Up		Agent is performing post call work. This state is designed to allow the agent to complete paperwork or other post call procedures associated with the last call. Calls may be delivered to agents in Wrap-Up state depending on the call centre configuration. By default, calls are not routed to agents in Wrap-Up state, except when the call centre is configured to enable calls to agents in the Wrap-Up state.

ACD STATE	ICON	DESCRIPTION
Sign-In		The Sign-In state is equivalent to a “clock in”, which means that the agent is at their work location but not yet ready to accept incoming calls. Calls are not delivered to the agent in this state. Sign-In is a transitional state and agents do not remain in this state; rather they transition to their post sign-in state. It is recommended that agents only be in this state between the time they arrive at work and the time they become available to accept calls.
Sign-Out		The Sign-Out state is equivalent to a “clock out”, which means that the agent’s workday or shift is completed and they are leaving. Calls are not delivered to the agent in this state. It is recommended not to use this state when agents leave for lunch or breaks during the day. The Unavailable state should be used for that.

In the Premium Call Center, an agent can set their ACD state to *Available*, *Unavailable*, or *Wrap-Up*. A supervisor can set the ACD state of an agent to *Available*, *Unavailable*, *Wrap-Up*, or *Sign-Out*.

The *Sign-In* state can only be assigned to an agent through CommPilot.

PHONE STATES

Phone states show the state of the monitored agent’s or supervisor’s telephone line.

For supervisors, the phone states are displayed as follows:

PHONE STATE	ICON	DESCRIPTION
Idle		Supervisor’s phone is on-hook, which means the supervisor is not on a call.
Busy		Supervisor’s phone is off-hook, which means that the supervisor is on a call.
Ringing		Supervisor’s phone is in alerting state; a call is currently being delivered to the supervisor.
Do Not Disturb		Supervisor has enabled the Do Not Disturb service.
Call Forwarding Always		Supervisor has enabled the Call Forwarding Always service. (Moving the mouse over this icon displays the number where the calls are forwarded.)

PHONE STATE	ICON	DESCRIPTION
Unknown		Supervisor's phone state is currently unavailable or unknown.

For agents, the phone states are combined with their ACD states and are displayed as follows:

PHONE STATE	ACD STATE	ICON	DESCRIPTION
Idle	Available		Agent's phone is on-hook and the agent is available to take ACD calls.
Ringing	Available		Agent's phone is ringing and the agent is available to take the call.
Any	Unavailable, Sign-In, Sign-Out		Agent is not available to take ACD calls.
Idle, Ringing	Wrap-Up		Agent is performing post-call work. They may or may not be available to take calls.
Busy	Available, Wrap-Up		Agent's phone is off-hook, which means that the agent is on a call. Whether calls MAY be delivered to agents depends on their call waiting settings, and the call centre's call waiting and wrap-up settings.
Do Not Disturb	Any		Agent has enabled the Do Not Disturb service. ACD calls are not delivered to agent in the Do Not Disturb call state. This state is NOT RECOMMENDED for Call Center agents. Agents should use the Unavailable ACD state when they need to temporarily block new incoming calls.
Call Forwarding Always	Any		Agent has enabled the Call Forwarding Always service. (Moving the mouse over this icon displays the number where the calls are forwarded.)
Unknown	Any		Agent's call state is currently unavailable or unknown.

CALL STATES

Call states are the states that your current calls can be in.

CALL STATE	DISPLAY NAME	DISPLAY ICON	CALL ACTIONS
Ringing In (Local)	Incoming Local		Answer, End
Ringing In (Remote)	Incoming		Answer, Conference, End
Ringing Out, Outgoing	Outgoing		Conference, End
Active	Active		Transfer, Hold, End, Conference
On Hold	Held		Transfer, Resume, End, Conference
On Hold (Remote)	Held		Transfer, Hold, End, Conference
Active (In Conference)	Active		Transfer, Hold, End
On Hold (In Conference)	Held		Resume, Transfer, End
Ringing In (Recalled Call)	Call Recalled		Answer, Conference, End

CALL TYPES

This section defines different types of calls measured in call center statistics.

NAME	DESCRIPTION
ACD Call	A call delivered to a call centre pilot number that is directed to an agent via the ACD function.
Inbound Call	A direct call to an agent. Other calls treated as Inbound calls include: • Calls that a supervisor retrieves from a queue • Calls that an agent receives due to a transfer from another agent (Note that they may have originated as ACD calls)
Outbound Call	An outbound call made by an agent.
Held Call	An ACD call that was placed on hold by an agent. Each time an agent places a call on hold, it is counted as a held call.
Transferred Call	An ACD call that was transferred to another number. Transfers can be the result of manual transfers by agents, transfers to voice mail because the calls were timed out, and transfers by supervisors to alternate queues. Note: A timed-out call is a call that is transferred due to exceeding the maximum wait time in a queue.
Answered Call	An ACD call that was answered by an agent.
Abandoned Call	An ACD call that entered the queue, but the caller hung up before the call was answered or transferred.
Received Call	An ACD call that was received and either answered or abandoned. Overflowed calls are not included.
Overflowed Call	An ACD call that was received, but immediately transferred to another destination due to the queue's exceeding the configured maximum queue size or the configured maximum wait time.
Queued Call	A Call that is in the Queue waiting to be answered

NAME	DESCRIPTION
Bounced Call	A call that has been transferred back to queue because it was not answered by an agent in the specified time.
Stranded Call	A call that is in a queue after all agents assigned to the queue have moved to the Sign-Out ACD state.

CHAPTER 13

APPENDIX C: KEYBOARD SHORTCUTS

When using keyboard shortcuts, make sure that the main interface window is in focus.

KEY	EQUIVALENT MOUSE ACTION	DESCRIPTION
ESC	Click the Close button  in a dialog box.	Closes the open dialog box.
ESC	Cancel the changes.	Exits the currently selected editable item, such as a text box.
/1	Click the Dialer text box.	Places the cursor in the Dialer text box; retains the currently selected item (if applicable).
?	Click the Search text box.	Places the cursor in the Search Contacts text box; retains the currently selected item (if applicable).
ARROW DOWN	Click the scroll bar or the next item in a list.	Selects the next item in the Call Console or Queued Calls pane.
ARROW UP	Click the scroll bar or the previous item in a list.	Selects the previous item in the Call Console or Queued Calls pane.
PAGE DOWN	Scroll down one page.	Goes to the next page in the Call Console or Queued Calls pane.

¹ In Internet Explorer 8, the "/" shortcut key does not always work. Pressing the key clears the default "Enter Number" text, but does not place the cursor in the input box.

KEY	EQUIVALENT MOUSE ACTION	DESCRIPTION
PAGE UP	Scroll up one page.	Goes to the previous page in the Call Console or Queued Calls pane.
1....9	Select a call in the Call Console pane.	Pressing “1” selects the first call; pressing “2” selects the second call; and so on.
SPACEBAR	Click Answer on the selected incoming call in the Call Console pane.	Answers the selected incoming call, or if no call is selected, the incoming call that has been waiting the longest. Pressing the SPACEBAR again answers the next longest-waiting incoming call, which puts the previously answered call on hold.
<PERIOD>	Click End on the selected call in the Call Console pane.	Ends the selected call.
ENTER	Click Dial.	If the cursor is placed in the Enter Number text box in the Dialer, dials the entered digits.
ENTER	Click Search.	If the cursor is placed in the Search Contacts text box, performs a search.
+	Click Transfer in the Dialer.	Transfers the selected call to the ad-hoc number entered in the Dialer.
SHIFT+1..9	Select a ringing call and click Answer.	Pressing “SHIFT+1” selects and answers the first ringing call, pressing “SHIFT+2” selects and answers the second ringing call, and so on.
SHIFT+1..9	Select an active call and click Hold.	Pressing “SHIFT+1” selects and places on hold the first active call, pressing “SHIFT+2” selects and answers the second active call, and so on.
SHIFT+1..9	Select a held call and click Retrieve.	Pressing “SHIFT+1” selects and retrieves the first held call, pressing “SHIFT+2” selects and retrieves the second held call, and so on.
S or s	Click the Settings link.	Goes from the main page to the Settings page.
B or b	Click the Back to Application link.	Goes back from Settings page to the main page.

KEY	EQUIVALENT MOUSE ACTION	DESCRIPTION
R or r	Click the Call History button.	Opens the Call History dialog box.
H or h	Click the Help link.	Opens this guide in a PDF format.
D or d	Click the Dashboard link (Supervisor)	Opens the Dashboard or brings the Dashboard to the front if it is already open.
SHIFT+L or SHIFT+I	Click the Sign Out link.	Signs the user out of the application.
SHIFT+A	Select Available (Agent).	Sets the agent's ACD state to Available.
SHIFT+U	Select Unavailable (Agent).	Sets the agent's ACD state to Unavailable.
SHIFT+W	Select Wrap-Up (Agent).	Sets the agent's ACD state to Wrap-Up.